OPERATORS SOFTWARE MANUAL

TAXPERFECT™

Form 1040 Department of the Treasury—Internal Revenue Service **U.S. Individual Income Tax Return** **1983**

For the year January 1–December 31, 1983, or other tax year beginning , 1983, ending , 19 — OMB No 1545-0074

Use IRS label. Otherwise, please print or type.	Your first name and initial (if joint return, also give spouse's name and initial): John D. and Mary J.	Last name: Taxpayer
	Present home address (Number and street, including apartment number, or rural route): 123 Main Street	Your social security number: 123 | 45 | 6789
	City, town or post office, State, and ZIP code: Your Town, Homestate 90000	Spouse's social security number: 987 | 65 | 4321
	Your occupation: Salesman	Spouse's occupation: Computer Operator

Presidential Election Campaign — Do you want $1 to go to this fund? X Yes / No. If joint return, does your spouse want $1 to go to this fund? X Yes / No. Note: Checking "Yes" will not increase your tax or reduce your refund.

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Filing Status (Check only one box)

1 — Single
2 — X — Married filing joint return (even if only one had income)
3 — Married filing separate return. Enter spouse's social security no. above and full name here.
4 — Head of household (with qualifying person). (See page 6 of Instructions.) If the qualifying person is your unmarried child but not your dependent, write child's name here.
5 — Qualifying widow(er) with dependent child (Year spouse died ▶ 19). (See page 6 of Instructions.)

Exemptions (Always check the box labeled Yourself. Check other boxes if they apply.)

6a	X	Yourself	X 65 or over	X Blind	Enter number of boxes checked on 6a and b ▶ 5
b	X	Spouse	X 65 or over	Blind	
c	First names of your dependent children who lived with you				Enter number of children listed on 6c ▶ 2

d Other dependents: (1) Name	(2) Relationship	(3) Number of months lived in your home	(4) Did dependent have income of $1,000 or more?	(5) Did you provide more than one-half of dependent's support?
Susan Taxpayer	Mother	12	No	Yes
Joe Taxpayer	Father	12	No	Yes

Enter number of other dependents ▶ 2

Add numbers entered in boxes above ▶ 5

e Total number of exemptions claimed

Income (Please attach Copy B of your Forms W-2, W-2G, and W-2P here. If you do not have a W-2, see page 5 of Instructions. Please attach check or money order here.)

7	Wages, salaries, tips, etc.		7	38,000
8	Interest income (also attach Schedule B if over $400 or you have any All-Savers interest)		8	12,000
9a	Dividends (also attach Schedule B if over $400) 9,800 , 9b Exclusion 200			
c	Subtract line 9b from line 9a and enter the result		9c	9,600
10	Refunds of State and local income taxes, from worksheet on page 10 of Instructions (do not enter an amount unless you deducted those taxes in an earlier year—see page 10 of Instructions)		10	100
11	Alimony received		11	200
12	Business income or (loss) (attach Schedule C) ▶		12	300
13	Capital gain or (loss) (attach Schedule D)		13	980
14	40% capital gain distributions not reported on line 13 (See page 10 of Instructions)		14	
15	Supplemental gains or (losses) (attach Form 4797)		15	300
16	Fully taxable pensions, IRA distributions, and annuities not reported on line 17		16	900
17a	Other pensions and annuities, including rollovers. Total received 17a 800			
b	Taxable amount, if any, from worksheet on page 10 of Instructions		17b	200
18	Rents, royalties, partnerships, estates, trusts, etc. (attach Schedule E)		18	-1,000
19	Farm income or (loss) (attach Schedule F) ▶		19	100
20a	Unemployment compensation (insurance). Total received 20a 100			
b	Taxable amount, if any, from worksheet on page 11 of Instructions		20b	100
21	Other income (state nature and source—see page 11 of Instructions)		21	500
22	**Total income.** Add amounts in column for lines 7 through 21 ▶		22	62,280

Adjustments to Income (See Instructions on page 11)

23	Moving expense (attach Form 3903 or 3903F)	23		
24	Employee business expenses (attach Form 2106)	24	500	
25a	IRA deduction, from the worksheet on page 12	25a	800	
b	Enter here IRA payments you made in 1984 that are included in line 25a above ▶			
26	Payments to a Keogh (H.R. 10) retirement plan	26	45	
27	Penalty on early withdrawal of savings	27	110	
28	Alimony paid	28	600	
29	Deduction for a married couple when both work (attach Schedule W)	29	375	
30	Disability income exclusion (attach Form 2440)	30	125	
31	**Total adjustments.** Add lines 23 through 30 ▶		31	2,555

Adjusted Gross Income

32	**Adjusted gross income.** Subtract line 31 from line 22. If this line is less than $10,000, see "Earned Income Credit" (line 59) on page 16 of Instructions. If you want IRS to figure your tax, see page 3 of Instructions ▶	32	59,725

TAXPERFECT-64™ and TAXPERFECT-128™

For

The

COMMODORE 64® and COMMODORE 128™

Created
by

FINANCIAL SERVICES MARKETING CORPORATION
500 North Dallas Bank Tower
12900 Preston Road
Dallas, Texas 75230
(214)386-6320

and

Marketed Exclusively
by

Financial Services Marketing Corporation
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TAXPERFECT-PC™, TP-64™, TP-128™, TP-PC™
TAXPERFECT PRO SERIES 1040™, TPRO SERIES 1040™
TAXPERFECT PRO SERIES 1120™, TPRO SERIES 1120™

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INTRODUCTION

The complete 1992 **TAXPERFECT-64™** and/or **TAXPERFECT-128™** Income Tax Return Preparation Software Package is comprised of the following three main program modules:

(1). **TP-64™** for the Commodore 64®.....**or**
TP-128™ for the Commodore 128®..**and**

(2). **DEPRECIATION**

(3). **THE 1040A PROGRAM**

TP-64™ and **TP-128™** are very fast program modules which may be used during all of the year for tax planning, for the interim updating of tax projections and also in the final verification of the completeness and accuracy of all of your manually-prepared Income Tax Returns. The User is able to save file data from one input session to be recalled, reviewed, updated, output or resaved at some later time, thus making it very easy to constantly redetermine your income tax liability as its current status is affected by circumstances which may change from time to time. The speed and simplicity of use of **TAXPERFECT** in TAX PLANNING mode encourage its frequent use for that purpose. However, **TAXPERFECT** is most valuable as the input, calculation and printing module for the correct preparation of your Income Tax Return.

TAXPERFECT-DEPRECIATION System (©1987-1993 by FSMC) is the stand-alone **TAXPERFECT** program module which was designed to generate and print depreciation schedules which are compatible with- and supplementary to- the IRS Form 4562. Depreciation is calculated using the ACRS rules required for depreciable assets put into service after December 31, 1980 and using the old, more familiar rules for the calculation of depreciation of those assets acquired and placed in service prior to January 1, 1981. For the new MACRS, the appropriate conventions are User-selectable on screen with respect to mid-month, mid-quarter and mid-year. Data developed by the use of this program can be printed any number of times for attachment to original and copies of tax return Form 4562, but will not be saved. See also Pages 30-39.

Since **TAXPERFECT** uses a print format compatible with the Internal Revenue Service Forms, its final version will be available for distribution after the Internal Revenue Service releases its final 1992 Income Tax Return Forms.

These program diskettes will be sent out **automatically** to **all** of the registered purchasers of the **TAXPERFECT** package as soon as possible thereafter. They will **also** contain the FSMC **DEPRECIATION** program provided herewith.

INPUT SHEETS

Specially formatted Data Input Sheets are provided in the program and can be printed at will by the User for the Form 1040 and all Forms and Schedules supported by the program (**TP-64** or **TP-128**); accordingly, the number of Forms and Schedules will be greater for **TP-128** Users.

Please note that care has been taken to make certain that the numbering sequence of the input items on screen corresponds precisely to that on the input sheets. It is also precisely the same numbering sequence as the IRS uses on the Federal Forms. In this manner we insure that, if your attention is diverted during input, you can know exactly where to resume on the input sheet by referring to the next item of input being prompted for on screen.

If you are a tax return Preparer, it is suggested that you print a complete set of input sheets and then duplicate a quantity of sets of these input sheets for your continued use, retaining the original set, unfilled, for future duplication and using the duplicate sets for filling out preparatory to actual data entry or (if you are a tax return Preparer), for your use in providing your clients with interview questionnaires, etc. (See also **PF7 I** function on Page 18).

Entry fields will be printed so that you can enter your responses (data). **NUMERIC** fields for amounts and for quantities are uniform in size. **ALPHA** fields for text input will vary in length to be precisely the length in number of characters provided in the Federal Form for your response to that question. Text fields show the number of characters allowed by the IRS in parentheses ( ) at the end of each input field. Similarly, the length of the text input field on screen will correspond to the length of the specified field on that Federal Form or Schedule.

The **TAXPERFECT** System will also print a **REVIEW** of all of the questions on all of the IRS Forms to which you have entered responses. (See also **PF7 R** function on Page 18).

128 Users: By first disabling (**PF7 C**) the Calculated-Value fields **before** printing your input sheets, your input sheets can print without the Calculated-Value fields (which are performed by **TAXPERFECT**). Thus, your input sheets will consist of only **input** items. The Calculated-Value fields can be restored or enabled by the User once again pressing **PF7 C**.

BACKUP

A single Security Backup Copy of the **TAXPERFECT** Income Tax Software may be obtained (by **registered** Owners only) for the nominal handling charge of $15.00. This may be accomplished by placing your order for the Backup Copy, accompanied by payment and by furnishing us with your pertinent owner information (name, address, city, state and zipcode) and the serial number of your ORIGINAL System diskette. We will match your owner information with your serial number and ship your Security Backup Copy of the **TAXPERFECT** Income Tax Software. Any other replacement of the **TAXPERFECT** Program Disk may only be secured in accordance with provisions as specified in Sections 9 and 10 of your Software License.

CONVENTIONS

For purposes of emphasis, ease of use, uniformity and consistency throughout the **TAXPERFECT** Program's Manual and screens, we wish to identify certain expressions, procedures, parameters and conventions as standard and to define them for the User:

The most important procedural parameter which is standard in the System is that numeric input of amount and/or quantity, if positive or plus or gain is entered as is; if negative or minus or loss, is entered as minus (-), e.g., **-1000.**

[PRESS] indicates that you should press down (and release) the key next indicated, e.g., **[PRESS] <RETURN>** means press the key marked **RETURN** (also known as- or the same as- the **ENTER** key on some keyboards).

<SHIFT> indicates that you should **[PRESS]** and hold down the **<SHIFT>** key and, while still holding it down, press down the key next indicated, e.g. **[PRESS] PF7 <SHIFT> A** means press and release the **PF7** key, then **[PRESS]** and hold down the **<SHIFT>** key and, while still holding it down, press down the key next indicated, i.e., the **A** key. The keystroke sequence which employs the **<SHIFT>** convention does so in order to impart a different (shifted) value to a key; e.g., the shifted value of **5** is **%**.

<ENTER> indicates that you should make an entry of your response to a particular question at the prompt. Usually the response that you enter is registered in the System by your pressing the **<ENTER>** key after your entry is made (also known as- or the same as- the **<RETURN>** key on some keyboards). Generally, entries made where the entry field displays a cursor require that you register your entry by pressing **<ENTER>** after your entry is made.

<RETURN>, as mentioned above, identifies the key marked **RETURN** (the same as the **ENTER** key on some keyboards). The same, in its effect (during data entry), as the cursor-down (↓) key, in that it enters "nothing" as a default value and accomplishes the "field-advance" to the next data-entry field.

[TYPE] instructs you to type in the character(s) next following the word **[TYPE]** exactly as displayed in bold face, including quotation marks and punctuation, if any (e.g., as used in the **LOADING INSTRUCTIONS**).

(Y,N,<SPC>=N/A) at a screen input prompt indicated that you may register any one of the three different answers: (1). Selecting and entering a **Y** will enter a response of **YES;** (2). Selecting and entering **N** will enter a response of **NO** and (3). Selecting and pressing **SPC** (the spacebar) will enter a response of **N/A** for **NOT APPLICABLE.**

A letter and number in brackets, e.g., **[H-12]** directs you to a sample screen of the described function on that Appendix Page Number.

A listing of the abbreviation conventions which we have adopted for use in wording of the input prompts in your MAIN SCREEN window display may be found in Appendix I.

OPERATION

The **TAXPERFECT-64** and **TAXPERFECT-128** Series of Income Tax Programs were designed to be both self-explanatory by their screens and fully prompted by their screens in order to facilitate their use by even the novice User. Whereas knowledge concerning the intricacies of the Internal Revenue Code is a matter of individual achievement among Users, **TAXPERFECT** Series of Income Tax Programs presumes no substantial level of knowledge among Users of our System, generally; thus, provision is made to simplify the input and strip the aura of mystery from the process, leaving in its place the assurance that, **given correct input by the User,** the result will be **absolutely** correct.

RUNNING TAXPERFECT

To aid you in becoming familiar with **TAXPERFECT**, we have included the following step-by-step walk-through of a loading sequence from startup to the MAIN SCREEN, first on the 64®, then on the 128™.

LOADING INSTRUCTIONS FOR TAXPERFECT-64

We emphasize that the loading instructions for the Commodore 64® be followed exactly as printed in your manual. Do not omit the **,1** after the **,8**. If you do, the **TAXPERFECT-64** program will not load. A Commodore 64® System characteristic will make it necessary for you to turn off the System, then turn it back on before restarting your **LOADING** routine. If you try to load the program, having omitted part of our instructions, then attempt to restart the load without first turning your computer off and then on again, it will not find the right file to load.

Insert your **TAXPERFECT-64** Master Program Disk into your disk drive.

If you are using a **single** disk drive, e.g., a CBM1541, you will insert the disk into your drive; the System recognizes it as the default drive or Device Address Number 8, Drive 0.

If you are using **two** single disk drives (at addresses numbers 8 and 9), insert your program diskette into the drive which has been default-designated as Device Address Number 8, Drive 0 (after you have redesignated the first drive as Device Address Number 9, Drive 0 by the "Change Address" program on your Commodore Utility Diskette on the CBM64/1541).

If you are using a **dual** disk drive, such as an MSD SD-2, insert the Master Program diskette into Drive 0 (it is already Device Address Number 8 by default).

To load and run **TAXPERFECT-64** from disk:

[TYPE] LOAD"*",8,1 and **[PRESS]** the **<RETURN>** key.

The screen will display:

SEARCHING FOR *
LOADING

Next, the **TAXPERFECT** logo and copyright notice will appear on the **TAXPERFECT-64** screen, followed by the FILING STATUS MENU, at the top of which there will be a prompt, inviting your selection. This first screen requests that you choose the taxpayer's Filing Status because all input is based on this selection and it is necessary to choose a Filing Status before entering any other items of information. Select your option and enter the number of your selection:

SELECT FILING STATUS

(1). SINGLE
(2). MARRIED FILING JOINTLY
(3). MARRIED FILING SEPARATELY
(4.) HEAD OF HOUSEHOLD
(5). QUALIFYING WIDOW(ER)

There are five (5) different FILING STATUS selections, each with a different tax rate schedule and related tax consequences. Filing Status is determined "as of December 31st." If you are married on December 31st, you may file as MARRIED FILING JOINTLY (Status No. 2) or as MARRIED FILING SEPARATELY (Status No. 3). If you are unmarried at year's end and have paid more than one-half of the cost of keeping up a home which was used as a home by someone whom you can claim as a dependent, you may be eligible to file as HEAD OF HOUSEHOLD (Status No. 4). If your spouse died during the year, you may still elect to file a Joint Return. If your spouse died **in either of the prior two years** and you maintain a home for a dependent child, you may be able to file as a QUALIFYING WIDOW(ER) (Status No. 5).

TAXPERFECT is key-driven and fully screen-prompted. The screens are designed to be easy-to-read input devices for your data; they will constantly report all essential information to you at a glance.

When you select the correct Filing Status, you will move to the MAIN SCREEN, at the top of which there is a constant Status Line as follows:

TAXPERFECT-64 1992 WAITING

WAITING changes briefly to **WORKING** when processing or program functions are being performed, and returns to **WAITING** when the function has been executed, indicating that the System is awaiting your next command or keyboard input.

Beneath the Status Line, the screen will report taxpayer's name (as soon as entered); taxpayer's Filing Status, e.g., **(MFJ);** the name and line number of the Form or Schedule that you are working in, e.g., **1040:6A.**

Next is the window which displays the text of the question with your response input and designates which fields are input by User response and which are calculated by the System **(C).** All fields designated by a **(C)** are a Calculated-Value, that is, no input is required from you. **TAXPERFECT** will calculate the answer based on your input responses.

Beneath the window is the input prompt field. The length of the input prompt field changes with each question, reflecting the exact character count that the Federal Forms allow for your response to their request for data on that line.

If you have a color monitor, note that the input prompt fields display a yellow cursor when the response called for **(ENTER TEXT)** is text (alpha input) and a green cursor when the response called for **(ENTER AMOUNT)** is an amount or quantity (numeric input). You always **[PRESS] <RETURN>** to enter or register your responses to these prompts.

As you scroll down or back up the form in the window, using your cursor-down and cursor-up keys, you will note another input prompt: **(Y,N,<SPC>N/A).** Selecting **Y** will enter a response of **YES;** selecting **N** will enter a response of **NO** and pressing the **<SPC>** (space bar) will enter a response of **N/A APPLICABLE.**

Another prompt is **0** (zero) **(CALCULATED VALUE)**, indicating that no input is required of you, since **TAXPERFECT** will calculate that line.

Finally, the bottom Status Line will constantly inform you of what your indicated action can be with: **PRESS ANY KEY TO CONTINUE; PRESS RETURN TO EXIT; <-- TO ABORT** or **HOLD COMMODORE KEY FOR SCREEN #2.** When this is done, you can view the **FORMS SELECTION** Menu and **CURRENT VALUES** Display, which changes constantly with your calculated input (releasing it restores you to the MAIN input screen).

Flashing messages, which are temporary in nature, usually appear just above the bottom Status Line; they are usually interrupted by your performing an indicated action. Their function is to remind you, e.g., that you have entered **COMMAND MODE** and the System is awaiting your command (choice of **PF7** functions). See the Section entitled **PF KEYS.**

AT THIS POINT, PLEASE TURN TO AND READ THE SECTION ON PROGRAMMABLE FUNCTION (PF) KEYS.

We suggest that you become familiar with the powerful effects produced by using these keys. They are fully explained. Take the time to read about them and become confident in their easy use. This Section begins on Page 13.

LOADING INSTRUCTIONS FOR TAXPERFECT-128

Insert your **TAXPERFECT-128** Master Program Disk into your disk drive.

If you are using a **single** disk drive, e.g., CBM1571, you will insert the disk into your drive; the System recognizes it as the default drive or Device Address Number 8, Drive 0.

If you are using **two** single disk drives (at address numbers 8 and 9), insert your program diskette into the drive which has been designated as Device Address Number 8, Drive 0 by the "Change Address" program on your Commodore Utility Diskette or by switching settings on the CBM128/1571.

If you are using a **dual** disk drive, such as an MSD SD-2, insert the Master Program Diskette into Drive 0 (it is already Device Address Number 8 by default).

To load and run **TAXPERFECT-128** from disk:

(1). **[PRESS]** and hold the **<SHIFT>** key
and **[PRESS]** the **<RUN/STOP** key.....**or**

(2). **[TYPE] LOAD"*",8** and **[PRESS] <RETURN>** .....**or**

(3). **[TYPE] RUN"TP-128",8** and **[PRESS] <RETURN>** .....**or**

(4). **[TYPE] LOAD"TP-128",8** and **[PRESS]** the **<RETURN>** key. When **READY** appears, **<ENTER> RUN** and **[PRESS] <RETURN>**.

The screen will display:

SEARCHING FOR *
LOADING

Next, the **TAXPERFECT** logo and copyright notice will appear on the **TAXPERFECT-128** screen, followed by the question **1040 TO RAMDISK? (Y/N).** If you answer **N,** the FILING STATUS MENU will appear next. IF you answer **Y**, a time for loading (**40 SECONDS**) will be specified and you will be asked **SCHEDULES A & B TO RAMDISK? (Y/N).** If you answer **N,** the 1040 will load into RAM in the specified time, followed by the FILING STATUS MENU. If you answer **Y**, a time for loading (**1 MINUTE 35 SECONDS**) will be specified and the last question will be asked

SCHEDULES C, D & E TO RAMDISK? (Y/N). Once again, if you answer **N,** the Form 1040 plus Schedule A and B will load into RAM in the total of both times specified. If you answer **Y,** then a loading time **(3 MINUTES 25 SECONDS)** for these three Schedules will be specified and all of the selected Forms and Schedules will be loaded into RAM in a **total** of all three loading times specified. A total loading time expressed as a countdown number (791 for all three) required by the 128 (configured with a 1571 disk drive) to load those options which you selected to go to RAMDISK will be displayed and becomes a descending time register on screen; when the countdown reaches **0**, RAMDISK is loaded. We recommend that 128 Users try it both ways, if only to see what a time saver it is to answer **Y** and load all 6 of these into RAM. The difference in speed of execution and screen scrolling is impressive, not to mention the fact that there is a substantial saving in the "wear and tear" on your disk drive. **[H-2], [H-3], [H-4].**

When this loading function has been completed, it will be followed by the FILING STATUS MENU, at the top of which there will be a prompt, inviting your selection.

This first screen **[H-5]** requests that you choose the taxpayer's Filing Status because all input prompts, calculations and choice of the correct tables are based on this selection; thus, it is necessary to choose a Filing Status before entering any other items of information. Select your option and enter the number of your selection:

SELECT FILING STATUS

(1). SINGLE
(2). MARRIED FILING JOINTLY
(3). MARRIED FILING SEPARATELY
(4). HEAD OF HOUSEHOLD
(5). QUALIFYING WIDOW(ER)

There are five (5) different FILING STATUS selections, each with a different tax rate schedule and related tax consequences. Filing Status is determined "as of December 31st." If you are married on December 31st, you may file as MARRIED FILING JOINTLY (Status No. 2) or as MARRIED FILING SEPARATELY (Status No. 3). If you are unmarried at year's end and have paid more than one-half of the cost of keeping up a home which was used as a home by someone whom you can claim as a dependent, you may be eligible to file as HEAD OF HOUSEHOLD (Status No. 4). If your spouse died during the year, you may still elect to file a Joint Return. If your spouse died **in either of the prior two years** and you maintain a home for a dependent child, you may be able to file as a QUALIFYING WIDOW(ER) (Status No. 5).

TAXPERFECT is menu driven and fully prompted. The screens are designed to be easy-to-read input devices for your data; they will report all essential information to you at a glance.

When you select the correct Filing Status, you will move to the MAIN SCREEN **[H-7]**, at the top of which there is a constant Status Line as follows:

TAXPERFECT 1992 WAITING

WAITING changes briefly to **WORKING** when processing or program functions are being performed, and returns to **WAITING** when the function has been executed, indicating that the System is awaiting your next command.

Beneath the Status Line, the screen will report taxpayer's name (as soon as entered); taxpayer's Filing Status, e.g., **(MFJ);** the name and line number of the Form or Schedule that you are working in, e.g., **1040:6A.**

Next is the window which displays the text of the question with your response input and designates which fields are input by User response and which are calculated by the System (C). All fields designated by a (C) are a Calculated-Value, that is, no input is required from you. **TAXPERFECT** will calculate the answer based on your input responses.

Beneath the window is the INPUT PROMPT field. The length of the input prompt field changes with each question to reflect the exact number of characters that the Federal Forms allow for your response to their request for information on that line.

If you have a color monitor, note that the input prompt fields display a yellow cursor when the response called for **(ENTER TEXT)** is text (alpha input) and a green cursor when the response called for **(ENTER AMOUNT)** is an amount or quantity (numeric input). You will usually **[PRESS] <RETURN>** to enter or register your responses to these prompts.

As you scroll down or back up the form in the window, using your cursor-down (↓) and cursor-up (↑) keys, you will note another input prompt: **(Y,N, <SPC> =N/A).** Selecting **Y** will enter a response of **YES;** selecting **N** will enter a response of **NO** and pressing the **<SPC>** (space bar) will enter a response of **N/A** for **NOT APPLICABLE.**

Another prompt is **0** (zero) **(CALCULATED VALUE),** indicating that no input is required of you, since **TAXPERFECT** will calculate that line.

Finally, the bottom Status Line will constantly inform you of what your indicated optional action can be with: **PRESS ANY KEY TO CONTINUE; PRESS RETURN TO EXIT; PRESS HELP KEY FOR MORE INFORMATION; PRESS SPACE BAR TO EXIT; ESC TO ABORT.**

"Flashing" messages, which are temporary in nature, usually appear just above the bottom Status Line; they are usually interrupted by your performing an indicated action. Their function is to remind you, among other things, that you have entered a particular operating mode; e.g., that you have entered **COMMAND MODE** and the System is awaiting your command input (choice of **PF7** functions). See the Section entitled **PF KEYS**, pp. 13-23.

The **CAUTION: X OVERRIDE (S)** message, (where **X** - No. of Overrides) which only appears if you invoke the **PF2** (Calculation Override) function, appears as a memorandum that you have overridden a Calculated-Value field. The number of overrides displayed will increase by one with each successive time that this function is invoked; it will decrease by one each time that you deselect an overridden Calculated-Value field and will disappear when you deselect the last field and restore **all** back to status as Calculated-Value fields once again. Note that the **C**, which normally identifies a Calculated-Value field, has been replaced with an * to further remind you that the value displayed in this field was entered by you and not derived by the System. You may deselect the Calculation Override for a particular field by the same means that you used to select it: returning to that field and invoking **PF2**. This will restore its status to Calculated-Value and the System will again take over the calculation of the value derived for that field on the basis of your input responses to prompts elsewhere in the System which flow to that line. Note that the * has been restored to a **C.**

The **■TAX PLANNING■** message, which appears when you invoke **PF7 M** and change the System Mode from TAX RETURN PREPARATION mode to TAX PLANNING mode, is also temporary in nature. It will appear below the top Status Line, temporarily replacing the Taxpayer Name and Filing Status Display field, just above the Form and Line No. Display field (See also Page 21).

On the left side of the screen is the **FORM SELECTION** Menu, highlighting, in reverse field, which Forms or Schedules have been activated by your selecting them.

On the right side of the screen is the **CURRENT VALUES** Display which changes constantly with your calculated input.

Pressing the **HELP** key will toggle three different **PF**-key **HELP** MENUS. See that section of the manual for a complete discussion of their uses. When viewing any of the three **PF**-key **HELP** MENUS, pressing the <SPACE BAR> will exit that MENU Display and restore you to the MAIN SCREEN. **[H-13], [H-14], [H-15].**

AT THIS POINT, PLEASE TURN TO AND READ THROUGH
THE SECTION ON PROGRAMMABLE FUNCTION (PF) KEYS.

LOADING INSTRUCTIONS FOR TAXPERFECT-1040A

COMMODORE 64:

Insert your **TAXPERFECT-1040A** Master Program Disk into your disk drive.

To load and run **TAXPERFECT-64 1040A** from disk:

[TYPE] LOAD"TP64-1040A",8,1 and **[PRESS]** the **<RETURN>** key.

Please refer to page 8 above for the balance of your instructions, which are the same for the 1040A program as they are for the full 1040 program, except that the number of Forms and Schedules supported by the 1040A is seven, including the Form 1040A.

COMMODORE 128:

Insert your **TAXPERFECT-1040A** Master Program Disk into your disk drive.

To load and run **TAXPERFECT-128 1040A** from disk:

(1). **[PRESS]** and hold the **<SHIFT>** key
and **[PRESS]** the **<RUN/STOP>** key.....**or**

(2). **[TYPE] LOAD"*",8** and **[PRESS] <RETURN>** .....**or**

Please refer to page 11 above for the balance of your instructions, which are the same for the 1040A program as they are for the full 1040 program, except that the number of Forms and Schedules supported by the 1040A is seven, including the Form 1040A.

AT THIS POINT, PLEASE TURN TO AND READ THROUGH
THE SECTION ON PROGRAMMABLE FUNCTION (PF) KEYS.

We suggest that you become familiar with the powerful effects produced by using these keys. They are fully explained. Take the time to read about them and become confident in their easy uses. For your added convenience a removable, one-page **Quick-Reference Guide** to the PF Keys is provided for you at Appendix J.

PF (Programmable Function) KEYS
TAXPERFECT-64 AND TAXPERFECT-128

PF1
Calculate

This function key will instantaneously calculate all Forms and Schedules and the Form 1040 which have been "activated" (See **PF7 F**) and in which value entries have been made. Updates the cumulative register fields in the CURRENT VALUES Display. Updates all of the fields designated by a "**C**" that denote calculated values. Also activates the Form 1040, if not already done. You may execute this function at any time and in any place in the program that you wish to do so. The **CALCULATE** function is **automatically** executed by the System (1). When you load into memory a data file which you had previously saved; (2) when you select **PF7 1** for printing a single Form or Schedule and (3) when you select **PF7 P** for printing of the entire tax return. When the System executes the automatic calculation function, it reports on screen that this function is occurring. **[H-6].**

PF2
Calculation Override

This function key will override the "**C**" Calculated-Value fields in either Tax Planning or Return Preparation Mode and permit the User to make a numerical entry in a field in which the System normally derives the value on the basis of other numeric input. In the window which displays the text of the question with your response input and designates which fields are input by User response and which are calculated by the System you shall notice, on the right, a **(C).** All fields designated by a (C) are, normally, a Calculated-Value, that is, no input is required from you. **TAXPERFECT** will calculate the answer based on your input responses. The **CAUTION: X OVERRIDE(S)** message **[H-9]** (where X=No. of Overrides) which only appears if you invoke the **PF2** (Calculation Override) function, appears as a memorandum that you have overridden a Calculated-Value field and will disappear when you deselect that field and restore it to status as a Calculated-Value field again. Note that the **C**, which normally identifies a Calculated-Value field, has been replaced with an * to further remind you that the value displayed in this field was entered by you and not derived by the System. You may deselect the Calculation Override for a particular field by the same means that you used to select it: by returning to that field and once again invoking **PF2**. This will restore its status to Calculated-Value and the System will again take over the calculation of the value derived for that field on the basis of your input responses to prompts elsewhere in the System which flow to that line. The System reports, on screen, how many overrides you have active. When you save a file with overrides, these are saved with it; thus, when you

recall that file, you are reminded that it contains calculation overrides and how many. Again, you may abort each override **at the same line where you activated it** by again pressing **PF2**.

We think it particularly worthy of mention that this feature has a number of valuable applications. Let us suggest a couple: The merging of multiple forms on one collective line entry; e.g., the entry of your multiple Schedule C on line 12 of Page 1 of the Form 1040..... or.....for creating "what-if" pro forma scenarios in TAX PLANNING Mode. No doubt you will think of others. The Calculation Override feature is one of the most powerful features of **TAXPERFECT**.

PF3
Go Down 1 Section

"Jumps Down" or advances the position of the data-entry window forward to the beginning of the **next** section on the current Form or Schedule. Saves time in scrolling downward using the **cursor-down** (↓) key.

PF4
Go Up 1 Section

"Jumps Up" or reverses the position of the data-entry window back to the beginning of the **previous** section on the current Form or Schedule. Saves time in scrolling upward using the **cursor-up** (↑) key.

PF5
Go To Form

This command allows you to leave the Form or Schedule in which you are currently making entries and go to another. You will be prompted to specify which Form or Schedule you wish to go to by selecting the **letter** on screen that designates **that** form. Doing so will highlight the selected Form or Schedule on the Forms Selection Menu. All data already entered in the Form that you are leaving is preserved. Selecting **PF5** automatically activates a Form **[H-18]** which has not been previously activated (by your use of the **PF7 F** command). It also activates the logical **path** between the selected Form and the Form 1040. For example, you **[PRESS] PF5** and select Form 3903 (Moving Expense), make entries to it and **[PRESS] PF1** to update the calculation of your value entries. You will notice that the System has now activated Schedule A (the Schedule to

which the Moving Expenses flow). If you **[PRESS] PF6** to exit Form 3903, note that you are returned to line 19 of Schedule A (Itemized Deductions) at the line for Moving Expenses. If you again **[PRESS] PF6** to exit Schedule A, note that you are returned to line 33A of the Form 1040 at the line for Itemized Deductions.

PF6
Return From Form

This command allows you to leave or return from the Form or Schedule that you went to using the **PF5** key. When you return, you are automatically returned to the default appropriate line number on the "calling Form or Schedule". For example, pressing **PF6** while in Form 4562 would return you to the appropriate "calling Schedule" (line 11 on Schedule C). Pressing **PF6** once more would return you to the appropriate "calling form" (line 13 on page 1 of the Form 1040). All data already entered in the Form or Schedule that you are leaving is preserved. See also the example just given above: Form 3903-to-Schedule A-to-the Form 1040.

PF7
Command Mode

This key turns on **COMMAND MODE** and is the prefix key to a number of helpful system functions which follow below. **PF7**, used in conjunction with other keys is a powerful utility for **TAXPERFECT** Users. When you **[PRESS] PF7**, the screen will display **COMMAND MODE [H-8]** to remind you that the System is waiting for your next following keystroke to execute your chosen function. Following are those functions which are executed using the **PF7** COMMAND MODE function key. Each one requires that you first **[PRESS] PF7**, then the other selection key; note that some functions specify **PF7** plus a shifted key. A few functions are for **TP-128** Users only.

PF8
DataChek™

Pressing this key will display a "window" screen which alerts you to one (or more) possible effects of your input, including the pinpointing of certain omissions. Example: it might advise you that your standard deduction was greater than the total of your itemized deductions; accordingly, **TAXPERFECT** will choose the one of greater benefit to you. Or, it may alert you to the possible necessity for Schedule SE if the result of the calculation of your income on Schedule C and F is greater than $400 in positive income. After you **[PRESS] PF1** to calculate your input before printing **[PRESS] PF8** to perform the Datachek™ function.

PF7 - THE TAXPERFECT COMMAND MODE

PF7 <SHIFT> A (64 AND 128)
Change Data Disk Drive Address

This is a four-way toggle selection made by pressing the space bar. **PF7 <SHIFT> A** allows you to preselect your drive configuration for data **save** and **retrieve**, thus permitting you to choose whether you want to: **(a).** Save your individual Taxpayer files to the same **single** disk drive that you are using for the program disk, or **(b).** Save your individual Taxpayer files to a second **single** disk drive, while the program resides in your first **single** disk drive, or **(c).** Save your individual Taxpayer files to drive **1** in your **dual** disk drive, while the program remains resident in drive **0** of your **dual** disk drive. This option comes set with a default address of **8.0.** Once selected (with **PF7 <SHIFT> A**), pressing the space bar will display the different options **8:0, 8:1, 9:0** and **9:1** and back to **8:0**. When satisfied with your choice, **[PRESS] <RETURN>** to enter your selection. The System will look to this drive to read stored data and to write files; please do not use a write-protect tab on your **TAXPERFECT** data disk. The option need be selected **only once** at the beginning of an input session. Thus, if your hardware application changes, you have the ability to effect the change at will. **[H-11].**

TAXPERFECT-128 Users: In addition to the above features, if you have **two single** disk drives and you insert your program disk in the drive at device address no. 8, the program will automatically default to the drive at device address no. 9 for your data disk. We have provided this data drive selection utility for your convenience and so that your options are not limited; whatever your chosen configuration, your data will be accessible in any new hardware configuration selection, if you elect to change the address of the drive to which you save data.

PF7 D (64 and 128)
Display The Disk Directory

Provides for you to output to the screen the directory of the files contained on your datadisk. **[H-17].**

PF7 L (64 and 128)
Load A File From The Data Disk

This function provides you with the ability to load into RAM (memory) a taxpayer's file previously saved to your data disk. The System will display a directory of its data file names and request (**SELECT FILE TO LOAD**) that you enter the name of the file to

be loaded by positioning the cursor over that taxpayer's highlighted name. You may change the position of the cursor to reflect your selection in either column of your disk directory by use of the cursor up (↑), down (↓), left (←) and right (→) keys **[H-20].** You should **[PRESS] <RETURN>** to enter your selection. **F1=TOGGLE DIRECTORY** informs you (**TP-128** only) that toggling the directory with **PF1**, as prompted, will display the second page of the directory; toggling it again with **PF1** will once again restore you to the first page of the directory. Meanwhile, the flashing message reminds you that you may **[PRESS] ESC TO ABORT.** Under control of this function, when you select the file to load, the System also performs several "housekeeping" tasks: **TAXPERFECT** first clears the computer's memory of any existing taxpayer data; it then loads the file selected; while loading the data file, it performs an automatic calculation update of the data in the file being loaded, entering the results in the CURRENT VALUES Display; finally it loads your Preparer data into memory (**TP-128** only). A brief message announcing each action flashes on your screen.

PF7 S (64 and 128)
Save A File To The Data Disk

You will be prompted to select a file name from the data disk directory by cursor movement: up (↑), down (↓), left (←) or right (→), if you are resaving an already existing file **or** to enter a new file name. **F1=TOGGLE DIRECTORY** informs you (**TP-128** only) that toggling the directory with **PF1**, as prompted, will display the second page of the directory; toggling it again with **PF1** will once again restore you to the first page of the directory. The System will report on screen, that it is **SAVING DATA FILE.** Next, a redisplay of the directory will confirm that the taxpayer file has been saved. Note that the System rearranges the data disk directory in alphabetical order each time that you save a new file to accommodate the new entry.

PF7 <SHIFT> Q (64 AND 128)
Create A Datadisk

This option provides you with the ability to format a datadisk under program control without having had to leave the program or break into Basic to do so **[H-12].** **TAXPERFECT** prepares the datadisk in a special required format to receive files for storage. Since it is necessary for the data disk to be formatted in this way, a diskette formatted otherwise would be unusable by the System. Under control of this option, you need not go through the intricacies of the formatting syntax. Simply follow the prompts, mindful of which disk drive you have selected as your data drive. If it is the same as your program disk drive, please be attentive to the prompt to remove your program disk and insert the data disk that you want formatted. If you leave the program disk in, everything which has been stored by on that disk by you, if anything, will be destroyed (including the **TAXPERFECT** Program) in the newing or formatting process. This

function will be performed by **TAXPERFECT** in the drive selected by you as your data disk drive (using **PF7 <SHIFT> A**). We provide you with the ability to abort the procedure by asking you if it is **OK TO FORMAT DATA DISK? (Y/N). [H-19].** If not **OK**, abort the procedure with **N.** AGAIN, if using a single disk drive, be careful not to format or erase your **PROGRAM** disk.

PF7 P (64 and 128)
Print Return

This command will print **all** of the Forms and Schedules, as highlighted on your FORMS SELECTION Menu, which you have activated using the Form Selection option: **PF7 F** and in the manner (single sheet or continuous-form) selected by **PF7 2.** In the event that you might have overlooked doing so (with your **PF1** key), the System will perform an automatic calculation update of your data before printing the return.

PF7 1 (64 and 128)
Print A **Single** Form Or Schedule

The System will prompt you to select which **single** Form or Schedule you want to print. In the event that you might have overlooked doing so (with your **PF1** key), the System will perform an automatic calculation update of your data before printing the selected Form or Schedule in your return.

PF7 2 (64 and 128)
Set Print Type - Single or Continuous

This option permits you to designate whether you want your printed output to be **single-sheet** (to Federal Forms) or **continuous-form** (for use with overlays).

PF7 R (64 and 128)
Review

The System will print a review of all active forms, printing **only** the item(s) on each form that have had data input to their fields, whether text or numeric. It will also print any items which were **derived** (when you invoke **PF1**) as Calculated-Values from your input into related fields. This is a particularly useful option for those who wish to prepare their return manually. Printing a Review will print only the items which you will wish to enter on the Tax Return.

PF7 I (64 and 128)
Print Input Sheets

The System will print a complete set of input sheets of all Forms and Schedules which are active. Note that the question stream for pages 1 and 2 of the Form 1040 will be different for each FILING STATUS option. The more generic question stream in all other Forms and Schedules is, in general, materially unaffected by any FILING STATUS option selection. Accordingly, if you are a Preparer and wish to generate a complete set of input sheets for reproduction and use with clients, you should run one Form 1040 for **each** FILING STATUS and only one of each of the other Forms and Schedules. This will produce a complete representative set of Input Sheets with the variable Form 1040 for every different Taxpayer Filing Status scenario.

PF7 F (64 and 128)
Activate/Deactivate A Particular Form
(Or Group Of Forms).

When a form is selected which is inactive, it will be activated and, accordingly, highlighted on your FORMS SELECTION Menu. If it is already active, selecting it again will **de**activate it. This form selection is done by selecting and entering the **letter** that designates each form. The selection activates or chooses which forms will be calculated (**PF1**) as well as printed whether in input sheet printing (**PF7 I**), review function (**PF7 R**) or printing of the return (**PF7 P**). The GO TO FORM function (**PF5**) will activate a Form or Schedule by default if you elect to "go to" that Form or Schedule. You may **de**activate any Form or Schedule except when you are presently "in" that Form or Schedule. If you do so unintentionally, the System will reactivate that Form or Schedule as a reminder that you have not yet exited the area that you wish to deactivate. **[H-10].**

PF7 N (64 and 128)
New Taxpayer

This option selection will clear from the memory all current Taxpayer data and restore you to the Filing Status Selection screen. Accordingly, before you select this option **[H-27]**, make certain that you have saved the present taxpayer's data, if you intend to, as clearing the memory will lose that taxpayer data. Before performing this function, the System will remind you by asking you: **OK TO BEGIN NEW TAXPAYER? (Y/N). [H-23].** Additionally, when you select the appropriate Filing Status, the System will automatically load your Preparer data (**TP-128** only).

PF7 E (64 and 128)
Erase Data File

This option furnishes you with a means of deleting unwanted data from a diskette. In this way, if you occasionally yield to the temptation to use a diskette as a filing cabinet for data that is no longer of any active or ongoing use to you, you have a way to delete these files effortlessly when they no longer serve a useful purpose. Depending on your hardware system configuration, **TAXPERFECT** will require that the data diskette be in the default drive when you scratch a file. Accordingly, whether in **TAXPERFECT-64** or **TAXPERFECT-128** the System will either look for- or prompt you to insert- your data disk. Then, the System will request (**SELECT FILE TO ERASE**) that you enter the name of the file to be erased by positioning the cursor over that taxpayer's highlighted name. You may change the position of the cursor to reflect your selection in either column of your disk directory by use of the cursor-up (↑), -down (↓), -left (←) and -right (→) keys. You should **[PRESS] <RETURN>** to register your selection. **F1=TOGGLE DIRECTORY** informs you (**TP-128** only) that toggling the directory with **PF1**, as prompted, will display the second page of the directory; toggling it again with **PF1** will once again restore you to the first page of the directory. When the file selected has been erased, a redisplay of the Directory will confirm that the taxpayer file has been erased. Note that the System also rearranges the Data Disk Directory in alphabetical order **each** time that you erase a file (to accommodate the removal), just as it does when you save a new file (to accommodate the new entry). **[H-21].**

PF7 <SHIFT> S (64 and 128)
Save A File To The Program Disk

This option will likely be more for the use of a **TAXPERFECT** User who is not a professional tax return Preparer and will have only his or her return to save to disk; accordingly, there may be no need to create a data disk solely for the purpose of archiving one return. This taxpayer may make use of the program disk to save his or her return. It will be saved as a file to which the System will assign the name **TAXPAYER**. However, be mindful of the fact that the System will provide for just **ONE** datafile on the **PROGRAM** disk; therefore, each successive file saved to the **PROGRAM** disk will also be named **TAXPAYER** and **will overwrite the previous file which the System had designated as being named TAXPAYER.**

PF7 <SHIFT> L (64) and 128
Load A File From The Program Disk

This option will likely be more for the use of a **TAXPERFECT** User who was just described in the foregoing paragraph. The function first clears the computer's memory of any current Taxpayer data; then it performs an automatic calculation update of the data

in the file being loaded, entering the results in the CURRENT VALUES Display and loads the Preparer data into memory (**TP-128** only). As just mentioned in the foregoing **PF7 <SHIFT> S** description, the System provides for just **one** datafile on the **PROGRAM** disk, to which the System assigns the name **TAXPAYER.** Accordingly, **TAXPERFECT** will not prompt you for the TAXPAYER file name in this loading process, since there can be only one file (named **TAXPAYER**) to retrieve and load from the PROGRAM disk.

PF7 <SHIFT> F (64 and 128)
Change Filing Status

Returns you to the FILING STATUS MENU, so that you may change taxpayer's FILING STATUS. May be done in the middle of data entry. If SINGLE, choosing this option and changing to MARRIED inserts all applicable "spouse" questions. If MARRIED, choosing this option and changing to SINGLE removes all inapplicable "spouse" questions. See also Page 9.

PF7 K (64 and 128)
Color Selection

Each time this option is selected the combination of background and border colors will change until all sixteen possible combinations have been viewed; the sixteenth time that you select this option, the System returns you to your original screen's default colors.

PF7 M (64 and 128)
Mode Selection

Changes program operation from TAX RETURN PREPARATION to TAX PLANNING mode. The default mode when the System comes up on screen is TAX RETURN PREPARATION mode. In TAX PLANNING mode, all TEXT and Y/N entry fields are eliminated (not displayed). Only amounts (numeric) entry fields are displayed, including Calculated-Value fields. Accordingly, screen scrolling is faster during data entry by as much as six times the speed (128 in RAMDISK mode) and significantly faster speed benefit can be seen even in 64 disk access time. A message is displayed on screen to remind you that you are in **TAX PLANNING** mode. The **•TAX PLANNING•** message, which appears when you invoke **PF7 M** and change the System Mode from TAX RETURN PREPARATION mode to TAX PLANNING mode, is temporary in nature. **[H-26].** It will appear below the top Status Line, temporarily replacing the Taxpayer Name and Filing Status Display field, just above the Form and Line No. Display field (See also Page 11). Selecting this option again restores you to RETURN PREPARATION mode. **[H-25].**

PF7 A (64 and 128)
Align Form

If using continuous-form paper stock, this option aids you in setting "top-of-form" by printing ***** TOP LINE ***** on the first print line of your page. When you have this option satisfactorily set, the System will, thereafter, always advance the paper to the next setting for "top-of-form" after a printing sequence is complete.

PF7 V (64 and 128)
Validate Disk

Validating a disk is a procedure which, from time to time is advisable, among other reasons, to "clean up" a disk. Under control of this command, you may remove from use the "bad" areas of a diskette, so that you cannot Read-from or Write-to.....them. It also deletes from a diskette any "Write-File-Open" files which were never closed properly by the System drive. Ordinarily, if you are experiencing difficulties saving data to a disk that you know has enough "BLOCKS FREE" to store the data, you should utilize the VALIDATE command to clear the diskette of problem areas. For more detailed information concerning the complete nature of the validating procedure, please refer to the technical manuals that accompanied your computer system.

PF7 X (64 and 128)
Exit TAXPERFECT

This option selection will provide your exit from the System and return you to the Commodore basic screen which is first displayed when you power up your computer system. Before executing this function, be certain that you have saved the present taxpayer's data, if you intend to, as exiting the System will lose that taxpayer data. Before performing this function, the System will remind you by asking you: **OK TO EXIT TAXPERFECT**? (Y/N). **[H-24].** If you wish to abort the EXIT function, **[PRESS] N** for **NO** and you will remain actively where you were in the System. If you **[PRESS] Y** for **YES,** the function will execute your exit procedure as first explained above.

PF7 <SHIFT> P (128 only)
Save Preparer Data

This option will provide you with the ability to input pertinent tax preparer data and save it. Generally, such an option should be used and the input made and saved **only** if you are a professional tax Preparer. At the bottom of page 2 of the Form 1040, you are asked to enter your name, address, city, state, zipcode, EID number, whether you are self-

employed or not, etc. When input is finished, **[PRESS] PF7 <SHIFT> P;** the **TAXPERFECT** System will create a file containing this data **and save it to the program disk.** Therefore, please **do not** use a write-protect tab on your program disk until you have used this option, if applicable to you. Each time you load a taxpayer file from the data disk or create a **new** taxpayer file, **TAXPERFECT** automatically loads in the Preparer data from the disk file into the appropriate place provided for that data at the bottom of page 2 of the Form 1040. Incidentally, once you have filled in the Preparer information, if you forget to save it at that moment and go on to some other Form or Schedule. Wherever you are in any form, **[PRESS] PF7 <SHIFT> P** and the Preparer file will be created, as long as you are still in the same taxpayer file as you were in when the Preparer data was entered. When entered once, it remains permanently on file unless or until changed.

PF7 W (128 only)
Screen Width Change - 40/80 Column

Gives you the ability to run in 40 column mode on the 128. Sometimes preferred for ease of viewing larger screen character output. In this mode, the **Commodore** key will act as the toggle in a new Two-Screen format from the Input Screen mode to the FORM SELECTION MENU Display and CURRENT VALUES Display, which will now appear together on the **second** Display screen. The **HELP** key becomes a three-way revolving toggle of the three **PF** keys' MENUS. Pressing **PF7 W** will prompt you to press the 40/80 button **on the monitor** to complete the transition to 40-column mode. Pressing **PF7 W** again will reverse the procedure to 80-column mode in the 128 (the monitor button will also need to be toggled back to its original setting). **NOTE:** The 128, operated in 80-column mode, performs to the maximum capacity of its design features, since it takes full advantage of the 2MHz speed of its CPU, (which, in 40-column mode, declines by one-half to 1MHz). **[H-16].**

PF7 C (128 only)
Calculate Fields Toggle

Disables or removes (does not display) all calculated fields from screen or printer output so that every prompt is an **input** prompt. This is a particularly useful option to invoke before printing a set of input sheets. Also for rapid data entry, this option accelerates screen scrolling time, since only **input** prompts are displayed in the data entry window. You enable the calculated fields again by the same means. **PF7 C.**

TP-128 CALCULATOR FEATURE

When your cursor is located at a numeric input prompt, the prompt becomes a full four-function calculator. P = plus; **M** = minus; * = multiply times; / = divided by and = displays the result. **<RETURN>** enters the result into the input prompt. Example: you would want to perform a calculation and enter the result into the **TP-128** input prompt at that line number. **1200 + 1800 - 1300 x 2 =** would be entered as **1200 P 1800 = M 1300 = * 2 = 3400.** To **<ENTER>** the **3400** (result displayed) as your response to that input prompt, **[PRESS] <RETURN>.**

OTHER KEYS DEFINED

<DELETE> KEY: deletes one character at a time in the input prompt field.

<HOME> KEY: unshifted **CLR/HOME** key returns you to the top of the Form or Schedule that you are in.

<CLEAR> KEY: shifted **CLR/HOME** key clears any mistakenly entered input from ALPHA or NUMERIC input prompt field with one keystroke; clears the input prompt field for correct re-entry.

We recommend that you select and execute each option once or twice to familiarize yourself with the effect on screen of your keystroke in selecting a particular option. Take this small amount of extra time to go through the entire program, entering sample data at random in various Forms and Schedules selected, moving from one place to another in the Program, seeing how easily you accomplish this. Be assured that this orientation time will reward you with confident, competent option selection and execution.

OTHER IMPORTANT POINTS TO REMEMBER (PUBLISHER'S NOTES)

(1). The **TAXPERFECT** Programs are very quick and efficient when used, as intended, in conjunction with the input sheets which you can print using your **PF7 I** option. Please take advantage of this System feature by using these sheets. Duplication of these sheets is encouraged AND IS HEREBY AUTHORIZED. Using them, you will find that data input is much faster, more efficient and better

organized. Also, as an aid in quick and efficient input, the numbering sequence of the self-generated input sheets precisely corresponds to the Federal line numbers on the appropriate Internal Revenue Service NUMBER Forms and LETTER Schedules. Those Users who are professional Income Tax Return Preparers might wish to duplicate a number of sets from their printed original and furnish them to their tax clients as question-naires to be filled out by the taxpayer prior to the conference with the Preparer. We feel that you will find your input sheets easier to read and use than those of the national service bureaus. We remind you that, when you select the **PF7 I** option, the input sheets which the System will print will be for all of those Schedules and Forms which have been activated using the **PF7 F** function.

(2). Whenever a datafile is saved to your data disk under a particular taxpayer's name, the new data deletes and replaces (overwrites) any data previously saved under that **same** taxpayer's file name; thus, if you wish to retain data previously saved for a taxpayer under the name Tom Jones 1, you should save his next file under the name Tom Jones 2 or some variation thereof. The file name need only vary by as small a difference as **one** character being added, deleted, changed, separated by a space, etc. The maximum number of alpha-numeric characters permitted in a file name is 16, including spaces.

(3). The **TAXPERFECT** Programs allow you to correct errors at any time by simply calling up the taxpayer's file; selecting activation of the appropriate form, jumping to the appropriate form; scrolling down to appropriate line for the item of input to be changed and entering the new replacement data or the item of new information where there was none. Pressing the **PF1** key at that point will recalculate the entire return and all supporting Forms and Schedules will automatically reflect the effect of the change just entered by you in every place on every form that it is affected by such change. There are no limits on the number of items you may change or the number of times you may change them. You may change as many items as you wish, as many times as you wish.

(4). Questions, suggestions, problems and inquiries should be addressed to:

FINANCIAL SERVICES MARKETING CORPORATION
500 NORTH DALLAS BANK TOWER
12900 PRESTON ROAD
DALLAS, TEXAS 75230
(214) 386-6320

In an effort to better serve you, we have recently increased our staff in order to enhance our response time. Our telephone lines will be staffed beginning at 11:00 AM CST. All OWNER REGISTRATION CARDS SHOULD BE FILLED OUT AND RETURNED PROMPTLY. Without your owner-registration card on file, we will be unable to provide you with assistance, as this service is reserved for **only** bona fide registered owners of record.

(5). We welcome any suggestions and constructive critiques that you may wish to share with us. It is our experience that this is the principal and most reliable source of our determinations for which features are most in demand among our owners and which new features you would most like to see added, System parameters permitting. Furthermore, while these programs have undergone extensive and exhaustive development and testing, it is conceivable, (though unlikely) that, due to the comprehensive nature and scope of the **TAXPERFECT** program, some undiscovered "glitch" may exist or occur. If you feel that you have detected a minor program error (and after reading the manual **CAREFULLY**), please let us know immediately. Every effort will be made to clear it up for you.

(6). The **"EXPLANATION OF FORMS AND SCHEDULES SUPPORTED"** section, which follows later in this manual, names and explains briefly the general application of each of the Forms and Schedules supported by **TP-64** and **TP-128**. These explanations are not in any way intended to be nor do they purport to be exhaustive discussions of each such item, since such explanations, thus made, would add hundreds of pages to this manual, rendering it unneces-sarily difficult to understand and to use.

Considerable effort has been expended to make the **TAXPERFECT** Software easy to understand and to operate by presenting information in a form readily comprehensible to the majority of average individuals. However, such thoughtful formatting notwithstanding, some individual taxpayers will have tax circumstances and consequences for which no adequate provision may reasonably be made in this manual. Since the **TAXPERFECT** software is primarily a time-saving, mathematical device **-NOT A TAX ADVISOR-,** we recommend that all similarly situated individuals with extraordinary tax situations or consequences seek the competent advice of professionals for all such tax questions.

(7). Input **whole** Dollar amounts only. **Do not** use cents. Printed output will be in whole Dollars; thus, to insure accuracy and consistency, input all amounts in whole Dollars, **without** commas. The IRS prefers this method, based on your having derived the whole Dollar amounts by rounding up at .50 or greater values.

(8). There is no need to use Dollar signs when entering amounts in those fields designated to accept Dollar amount input. Also, note that, since your input is in whole Dollars, you need not input a decimal point.

(9). We remind you that, when inputting a greater number of items than the number of lines provided by IRS on a form, enter until one line remains, then accumulate the remaining items collectively into the last line and enter the description as **see attached** and the amount as the collective total of these amounts represented by the collective description **"see attached".** Example: If you are listing twelve items where only six spaces are provided, describe and list items 1 through 5; then total items 6 through 12 and, on line 6, enter the collective total of those items and the description **See Attached** for the description of each of the items (6-12) which comprises that collective total which you entered on line 6.

PRINTING INSTRUCTIONS FORMS

A number of reputable firms provide overlays which are **identical** in format to the Federal Forms (and, thus, compatible with our software). If you decide to make your own overlays, we recommend that you compare your overlays with the original Federal Forms by placing your overlay directly over the original form to be certain that the vertical and horizontal spacing of your overlay is identical with the Federal Form. Be very careful that the top and bottom line of the form can be aligned with the corresponding lines of your overlay **at the same time.** If not, the overlay will not work.

We continue to maintain that the most efficient method of processing income tax returns using the **TAXPERFECT** Programs is to use your regular computer paper and transparencies or overlays of the Federal Forms. The quality of commercially-produced overlays is very good. GLEATWOOD ENTERPRISES uses an excellent process for producing its overlays and the quality of the overlays that we saw was extremely good. REMEMBER, if you order forms or overlays from GLEATWOOD, be certain to tell them that you are using **TAXPERFECT** Software, as this will help to insure that you receive a complete set of the correct forms and overlays. As an added bonus for our Users, GLEATWOOD is offering a substantial discount on the cost of overlays if you order the complete **TAXPERFECT-64** set (S-100) or **TAXPERFECT-128** set (S-101). By purchasing the complete sets you are able to secure them for $65 and $75 respectively.

PRINT OPTIONS

We feel that the print option instructions on screen are as self-explanatory as are the other portions of the program; however, we will mention here a paragraph or two that may further assist you in understanding them.

TAX FORMS

TAXPERFECT for 1983 (and later years) has eliminated the necessity for a separate NELCO format or IRS format print option (using the standard IRS print format to cut-sheet Federal Forms and overlays), since almost all of you indicate preference for the standard IRS format. Also, output to blank continuous-form stock for use with transparencies is done to standard IRS format. Thus, whether outputting to blank stock for use with transparencies or outputting to the Federal Forms themselves, the format will be the standard IRS format. In our opinion, your best source of quality transparencies compatible with this standard IRS output format is Gleatwood Enterprises (see below).

Because Gleatwood uses its own specialized printing process, the **black ink** on their overlays **will not rub off!** All overlays are provided with an attached backing sheet to aid in stabilizing your forms handling and positioning when you place them on your copier. Gleatwood will give the same preferential treatment to **TAXPERFECT** customers as you have become accustomed to receiving. Incidentally, for those of you who use multiple-part snap-out forms, NELCO informs us that they will provide sets for pages 1 and 2 of the Form 1040 and others **in the standard IRS format,** instead of their NELCO format. If this multiple-part snap-out form set is your preference, please verify with NELCO, Green Bay, WI which forms they will be making available.

The following information will aid you in contacting Gleatwood concerning your overlays. Their order form has been included in your **TAXPERFECT** package.

Gleatwood Enterprises - Overlay Department
P. O. Box 30129
San Bernardino, CA 92413-0129

Credit Card Orders or For:
Assistance Call To (714) 886-9431.
FAX orders Send To (800) 776-6866.

PRINTER SETTING

NOTE:

All print formats require a printer horizontal pitch setting of 10 CPI (characters per inch) and a vertical line spacing of 6 LPI (lines per inch). These values are usually the default values in most printers and require no action on the part of the User.

CONTINUOUS FORMS ALIGNMENT

If you elect to use the overlays or the blank paper with the IRS line number option, then you need only advance your continuous-form paper stock to the top of the page (top-of-form control) once, using the **PF7 A command.**

We recommend that **overlay Users** align their paper so that the **"*** TOP LINE ***"** prints at the very top of the page (on the first-line print position just below the horizontal perforation of your continuous-form stock). Once set, the form will be advanced automatically after each tax form is printed.

PRINTING TO CUT-SHEET TAX FORMS

After each form is output to printer, you will have the option of printing another copy. You may find this **reprint** option to be a particularly useful opportunity to improve your first effort if, for any reason, you were not entirely satisfied with your printer's output quality on the first printout.

Printing directly onto the IRS Forms can be a bit exasperating at first; however, with a little practice you can become quite expert at quickly aligning the forms in your printer. We suggest that you run several practice copies of each form (using test data) and carefully note where the alignment marks "+" print on each form when that form is properly aligned. You should also note how much of the top of each form is visible when

it is properly positioned in your printer; you may wish to create a reference set of forms with alignment marks on them to indicate how much of the form is visible when it is properly aligned. In no time at all, you'll be up and running (See page 27 under PRINTING).

We would like to provide you with more precise alignment instructions; unhappily, all printers are not built the same; not all "left margins" are at the same place on all printers; not all "top-of-forms" are at the same place on all shields on all printheads of all printers. Precise alignment indicators for one printer are of no value when applied to another. It has been said that, like dying and being born, this (getting familiar with your printer's unique parameters) is something that you, the User, must do for yourself. As a result of this lack of standardization in the printer industry, we suggest that you begin with our hints above and adapt them to what works best for you and your printer's particular characteristics.

ADDITIONAL INFORMATION

The INTERNAL REVENUE SERVICE maintains a Taxpayer Assistance Program throughout the United Status. The telephone numbers to call for any given area are listed in the IRS Form 1040 instruction booklet and can be used whenever you may have a question regarding the tax rates, appropriate forms to use, IRS interpretations of the tax law and many other helpful services. Additionally, the IRS publishes a very good reference and instruction guide which goes into much greater detail regarding the treatment of income, deductions, exemptions and credits than does the IRS Form 1040 instruction booklet which you receive each year. This reference guide is named IRS PUBLICATION 17, and is yours, WITHOUT CHARGE, for the asking, from your local IRS office.

STAND-ALONE DEPRECIATION PROGRAM
©FSMC

FIRST, WE REMIND YOU THAT, WHETHER YOU ARE RUNNING **TP-64** OR **TP-128**, **DEPRECIATION RUNS IN 40-COLUMN 64 MODE.** IT IS LOADED BY TYPING **LOAD"DEPRECIATION",8,1 <RETURN>**.

This program was created expressly in response to the many requests by **TAXPERFECT** Users who are individual owners of small businesses and who were in need of assistance in calculating their depreciation deduction on their personal income tax returns. If it were not for the depreciation calculation, business net income could readily be calculated by simply subtracting the total of all of the business's expenses from the business's gross income. The result would be net income from the business. By using ©FSMC's **TAXPERFECT** STAND-ALONE DEPRECIATION PROGRAM, you should be able to easily arrive at a depreciation figure which you can then combine with your other business expenses (e.g., on Schedule C to yield TOTAL BUSINESS EXPENSES. Subtracting TOTAL BUSINESS EXPENSES from TOTAL BUSINESS INCOME (less cost of goods sold - if any), will produce the resulting net income (or loss) from your business.

Prior to 1981, depreciation could be calculated under several different methods, including straight-line, as well as several methods of accelerated depreciation. For assets acquired prior to January 1, 1981, these methods should still be used; however, assets acquired **after** December 31, 1980 must be "depreciated" using the new **"ACRS"** (**A**ccelerated **C**ost **R**ecovery **S**ystem) rules. This new System has its own peculiar complexities, but in many instances, it allows a more rapid write-off than was allowed the taxpayer under the old depreciation rules.

The **TAXPERFECT** program treats the different types of "depreciation" separately and prints a separate subtotal for each class of Depreciation, including Section 179 and a category called "Other" which is User-specifiable with respect to the amount of the deduction to be taken for the current year. The IRS Form 4562 is the form used to report "Depreciation" calculated under either set of rules (the "old rules" or the "new" ACRS rules or the "modified" ACRS rules).

DATA INPUT CONVENTIONS

ASSET DESCRIPTION: Enter the name of the depreciable asset.

METHOD OF DEPRECIATION:

STRAIGHT LINE - Calculates depreciation by dividing BASIS by the recovery period.

DECLINING BALANCE - Calculates by 125%, 150%, 175% or 200% methods.

ACRS - Uses 3, 5, 10, 15, 18, or 19-year ACRS recovery tables.

NEW ACRS - Uses 1987 modified ACRS rules. For assets placed in service after 12-31-1986, depreciation should be calculated using the Declining Balance method and not the original ACRS system.

The new ACRS system is based on the following:

3, 5, 7, 10 year property - 200% DB. Apply half-year depreciation the year asset is placed in service and half-year the year asset is retired or property is withdrawn from service.

15, 20 year property - 150% DB. Same half-year conventions as above.

Manual depletion entry for luxury auto caps.

SECTION 179 - Uses entire BASIS as depletion value.

OTHER - Manual entry of depletion value.

YEAR ACQUIRED: Enter year asset placed in service. Used by ACRS calculation to determine recovery year.

DEPRECIATE ENTIRE YEAR:

Y - Calculations assume property was in use for the full 12-month year.
N - Sub-Menu:

1-12: Enter month placed in service.
Q1-Q4: Enter quarter placed in service.
H: Half-year

1-12 calculates depreciation based on mid-month convention. **Q1-Q4** is based on the mid-quarter convention. **H** depreciates for 6 months.

BASIS: Enter the original cost of the asset for all depreciation methods except **Declining Balance**. For **DB**, use the remaining undepreciated value. Basis should represent only the portion of the asset used for business.

CALCULATE DEPRECIATION:

Y - Depreciation value automatically computed. **N** - Allows manual entry of depreciation value.

RUNNING THE DEPRECIATION CALCULATOR

FSMC's ©**TAXPERFECT** DEPRECIATION CALCULATOR is a fully menu-driven utility which provides for quick, easy entry of your data. You shall have sub-menus of options to help you make data-entry decisions tailored to your individual tax situation without having to perform time-consuming experimentation. For example, after each asset item is entered, the System will return you to the Main Menu in the Depreciation Program (see below), so that you can select what function you wish to perform next.

Once loaded, as above explained, the menu of options at the beginning of the program asks you whether you will:

(A) - ADD ITEM
(C) - CHANGE ITEM DATA
(R) - REVIEW
(P) - PRINT

If you choose A, since there are no items to Review or Change or Print, the screen will display a box for data entry with the prompt: **ASSET DESCRIPTION**.

When you have entered the description of the asset, to **<ENTER>** your response, **[PRESS] <RETURN>**.

Next, the screen will prompt you to select a method of depreciation:

METHOD OF DEPRECIATION

(1). STRAIGHT LINE
(2). DECLINING BALANCE
(3). ACRS
(4). SECTION 179
(5). OTHER

<SELECT NUMBER>

STRAIGHT LINE:

If you select **STRAIGHT LINE,** you will be prompted with an entry field to enter the **RECOVERY PERIOD** (YEARS). Enter in whole years or decimal input, e.g., **15** or **31.5.**

You will be asked to enter the **YEAR ACQUIRED**; then, **DEPRECIATE WHOLE YEAR? (Y/N).** If you respond **Y** for yes, the System will ask you for your cost **BASIS.** If you respond **N** for no, it will ask you to specify what **portion** of the year (if not the whole year) you want to depreciate:

1-12: MONTH PLACED IN SERVICE
1Q-4Q: QUARTER PLACED IN SERVICE
H: HALF YEAR

Enter the appropriate response in the box; **then** you will be asked to enter the amount of your **BASIS**.

Finally, you will be asked whether you want the System to **CALCULATE** the **DEDUCTION?** If you reply **Y** for yes, you will be returned to the MAIN MENU; if your reply is **N** for no, you will be prompted to **<ENTER AMOUNT>** of your deduction. Enter the appropriate response in the box; **then** you will be returned to the MAIN MENU.

DECLINING BALANCE:

Appropriately, the question stream will differ if you elect to **ADD** and choose **DECLINING BALANCE** for your method. This time you will be prompted to choose **which** method of the **DECLINING BALANCE** category:

(1). 125% DB
(2). 150% DB
(3). 175% DB
(4). 200% DB

<SELECT NUMBER>

When you make your selection, you will be prompted, with an entry field, to enter the **RECOVERY PERIOD** (YEARS). Enter in whole years or decimal input, e.g., **15** or **31.5.**

You will be asked to enter the **YEAR ACQUIRED;** then, **DEPRECIATE WHOLE YEAR? (Y/N).** If you respond **Y** for yes, the System will ask you for your cost **BASIS.** If you respond **N** for no, it will ask you specify what **portion** of the year (if not the whole year) you want to depreciate:

1-12: MONTH PLACED IN SERVICE
1Q-4Q: QUARTER PLACED IN SERVICE
H: HALF YEAR

Enter the appropriate response in the box; **then** you will be asked to enter the amount of your **BASIS.**

Finally, you will be asked whether you want the System to **CALCULATE** the **DEDUCTION?** If you reply **Y** for yes, you will be returned to the MAIN MENU; if your reply is **N** for no, you will be prompted to **<ENTER AMOUNT>** of your deduction. Enter the appropriate response in the box; **then** you will be returned to the MAIN MENU.

A C R S:

If your selection is **ACRS**, you will first be asked to choose from the following list to specify what class of property you are depreciating (3-Year, 5-Year, 10-Year etc.):

(1). ACRS-3
(2). ACRS-5
(3). ACRS-10
(4). ACRS-15
(5). ACRS-18
(6). ACRS-19

<SELECT NUMBER>

Following your option selection, the System will return to the standard question stream already discussed above with respect to YEAR ACQUIRED, BASIS, etc., as follow below:

You will be asked to enter the **YEAR ACQUIRED;** then, **DEPRECIATE WHOLE YEAR? (Y/N).** If you respond **Y** for yes, the System will ask you for your cost **BASIS.** If you respond **N** for no, it will ask you to specify what **portion** of the year (if not the whole year) you want to depreciate:

1-12: MONTH PLACED IN SERVICE
1Q-4Q: QUARTER PLACED IN SERVICE
H: HALF YEAR

Enter the appropriate response in the box; **then** you will be asked to enter the amount of your cost **BASIS.**

Finally, you will be asked whether you want the System to **CALCULATE** the **DEDUCTION?** If you reply **Y** for yes, you will be returned to the MAIN MENU; if your reply is **N** for no, you will be prompted to **<ENTER AMOUNT>** of your deduction. Enter the appropriate response in the box; **then** you will be returned to the MAIN MENU.

SECTION 179:

Next, the question stream will differ still more if you elect to **ADD** and choose **SECTION 179** for your method:

The System will ask that you enter the amount of your **BASIS.** Then, you will be asked whether you want the System to **CALCULATE** the **DEDUCTION?** If you reply **Y** for yes, you will be returned to the MAIN MENU; the System will assume that the entire cost basis is the amount which you wish to use in the calculation. If your reply is **N** for no, you will be prompted to **<ENTER AMOUNT>** of your deduction. Enter the appropriate response in the box; **then** you will be returned to the MAIN MENU.

OTHER:

When you make your selection, you will be prompted, with an entry field, to enter the **RECOVERY PERIOD** (YEARS). Enter in whole years or decimal input, e.g., **15** or **31.5.**

You will be asked to enter the **YEAR ACQUIRED;** then, **DEPRECIATE WHOLE YEAR? (Y/N).** If you respond **Y** for yes, the System will ask you for (1) your cost **BASIS** and (2) the amount of the **DEDUCTION,** returning you, then, to the MAIN MENU. If you respond **N** for no, you will be asked to specify what **portion** of the year (if not the whole year) you want to depreciate:

1-12: MONTH PLACED IN SERVICE
1Q-4Q: QUARTER PLACED IN SERVICE
H: HALF YEAR

Enter the appropriate response in the box; **then** you will be asked to **<ENTER AMOUNT>** of your cost **BASIS** and to **<ENTER AMOUNT>** of the **DEDUCTION** to be taken. After choosing and entering your option selections, you will be returned to the MAIN MENU.

Returning to the MAIN MENU in the **DEPRECIATION** program, you have now explored each of the successively branching options available to you under the MAIN MENU option **ADD**, which provides you with the ability to add items for calculation under any of the methods of depreciation, including your own specification (OTHER).

The **CHANGE** option will allow you to change data for any of the assets entered; by specifying which one, the System will prompt you through the proper responses in a straightforward manner.

Finally, the **REVIEW** option provides you with the opportunity to preview your input on screen before outputting it to the printer. It will begin by displaying the last asset entered:

DESCRIPTION.....XXXXXX
YEAR ACQUIRED.....XXXXXX
METHOD (OF DEPRECIATION).....XXXXXX
PERIOD (RECOVERY).....XXXXXX
MONTHS USED.....XXXXXX
BASIS.....XXXXXX
PERCENTAGE (FOR YEAR).....XXXXXX
DEDUCTION (THIS YEAR).....XXXXXX

B = JUMP BACK (to first entry) **A - JUMP AHEAD** (to last entry)

N = NEXT (next entry) **L = LAST** (last entry) **X = EXIT** (exit to menu)

Items **B, A, N** and **L** are self-explanatory. You may, therefore, **REVIEW** in any order provided by these options. If, however, you elect to continue data entry, **<ENTER> X** and you will **EXIT** this submenu and be returned to the MAIN MENU, where you will be prompted to indicate whether to **ADD, REVIEW, CHANGE** or **DELETE** an item (or, if finished, to **PRINT**). When finished inputting, you will have the additional option: to **PRINT** your Schedule of depreciable property. When you have finished printing, you will be asked whether you would like to have an additional copy of the Depreciation Schedule printed. If you answer **"yes"**, the System will perform that function (as many times as needed); if you reply **"no"**, the System will return you to the MAIN MENU.

Following is an example of the printer output format.

NOTE: Beginning in 1982, businesses have the option, under IRC Section 179, to expense currently (rather than to depreciate over a number of years) a graduated amount which is presently set at $10,000 worth of business assets acquired during the year. If this is done, then, for purposes of this Depreciation Program, you should reduce the cost of that (those) asset(s) by the amount of this (Section 179) expense that you are taking. The **TAXPERFECT** program will then calculate depreciation based on the remaining cost of the asset which was **NOT** expensed.

INPUT AND FORMATTING

A Reminder:
Output has been formatted in round whole Dollar amounts. Most importantly, this is the format preferred by the Internal Revenue Service. Accordingly, in order to maintain as much accuracy as is possible in the relation between input and output, it is essential to remember that **INPUT SHOULD ALWAYS BE IN ROUNDED WHOLE DOLLAR AMOUNTS ONLY.**

PRINTING

If yours is a friction-feed printer, simply roll in the IRS Forms while under the **PF7 2** (Set Print Type-Single Sheet) mode in the order prompted for by the **TAXPERFECT** Program. You will be provided with two printer alignment indent marks (+) at the **first** and **last** print positions (column 1 and column 72) and two lines above the first unbroken horizontal line at the top of every form, front is a tractor **only** printer (without a friction-feed feature) you can use your regular, blank, continuous-form paper with GLEATWOOD's overlays or you can output the return on continuous form stock and **manually** copy the output data onto your Tax Return Forms and Schedules.

HINTS AND SUGGESTIONS

A Reminder:
The two positions "top of form" and "left margin" vary from one printer to another and they are best known to each User as they relate to that User's System. It has been said that becoming familiar with forms orientation on a printer, like dying and being born, is something that everyone does individually and no one can do for them. We urge you

to perform the print cycle a few times, using blank paper, to familiarize yourself with the way that the **TAXPERFECT** System works. You can also use these runs for the very practical reason that they will provide you with a preview of the return for completeness and accuracy. A brief period invested in this procedure will return many dividends to you in the form of confident and proficient use of your **TAXPERFECT** System. Once you are satisfied with the results of your output and have the changes that you wish to make (if any) - **THEN** - print the return. Owners of letter-quality printers are reminded that their printers are subject to the same horizontal pitch (10 characters per inch) and vertical pitch (6 lines per inch) default values as apply to owners of dot-matrix printers.

For those taxpayers who still prefer to fill out their income tax return by hand, we suggest that you print the **TAXPERFECT** "Review", using your **PF7 R** option, since it prints only active items (lines on which some entry was made by you), then enter them by copying them by hand to the appropriate places on the Tax Forms.

IMPORTANT NOTICE

Please remember to check your return carefully once it has been printed, with particular emphasis on directing your attention to the following:

(1). Does your return include **ALL** of the items of income, deductions, adjustments and credits which you intended it to include?

(2). Have you prepared any other Forms or Schedules required by the IRS in support of your Form 1040? Have you manually prepared any other Forms and Schedules needed in support of your Form 1040, but not printed by the **TAXPERFECT** System; and do the numbers (amounts) on these Forms and Schedules agree with those entered on pages 1 and 2 of your Form 1040?

(3). Are there errors of any kind on your return which require a manual override correction or a reprinting of your return?

REMEMBER

Having your computer generate your tax return does not, in itself, guarantee that your return is completely correct, just as having it prepared by a professional also does not guarantee that it is correct. A correct return presumes and requires complete and accurate input of data as well as correct computational algorithms. We have tried to ensure that

the computations are correct and that the print formats are free from error. Since it is impossible to test every conceivable situation or set of circumstances, it is possible that there may be something that we overlooked. The IRS has always maintained that the sole responsibility for the completeness and accuracy of your tax return rests with you (the taxpayer), regardless of whether it was prepared by a CPA, a computer or you personally. Therefore, we urge you to review your return carefully.

We hope that your **TAXPERFECT** package has provided you with the help that has made your annual tax experience less of an ordeal.

FINANCIAL SERVICES MARKETING CORPORATION

APPENDIX A

ERROR MESSAGES

20. **READ ERROR** (block header not found)
The disk controller is unable to locate the header of the requested data block. Caused by an illegal sector number or by header which has been destroyed.

21. **READ ERROR** (no synch character)
Indicates a hardware failure. The disk controller is unable to detect a synch mark on the desired track. Caused by a misalignment of the read/write head, no diskette present, unformatted or improperly formatted diskette. Can also indicate a hardware failure.

22. **READ ERROR** (data block not present)
The disk controller has been requested to read or verify a data block that was not properly written. This error message occurs in conjunction with the BLOCK commands and indicates an illegal track and/or sector request.

23. **READ ERROR** (checksum error in data block)
This error message indicates that there is an error in one or more of the data bytes. The data has been read into the DOS memory, but the checksum over the data is in error. This message may also indicate grounding problems.

24. **READ ERROR** (bad sector flag/byte decoding error)
The data or header has been read into DOS memory, but a hardware error has been created due to an invalid bit pattern in the data byte. This message may also indicate grounding problems.

25. **WRITE ERROR** (write-verify error)
This message is generated if the controller detects a mismatch between the written data and the data in the DOS memory.

26. **WRITE PROTECT ON**
This message is generated when a controller has been requested to write a data block while the write-protect switch is depressed. Typically, this is caused by using a diskette with a write protect tab over its notch.

27. **READ ERROR** (checksum error in the header)
The controller has requested an error in the header of the requested data block. The block has not been read into the DOS memory. This message may also indicate grounding problems.

28. **WRITE ERROR** (long data block)
The controller attempts to detect the synch mark of the next header after writing a data block. If the synch mark does not appear within a pre-determined time, the error message is generated. The error is caused by a bad diskette format (the data extends into the next block) or by a hardware failure.

29. **DISK ID MISMATCH**
This message is generated when the controller has been requested to access a diskette which has not been initialized. The message can also occur if a diskette has a bad header.

30. **SYNTAX ERROR** (general syntax)
The DOS cannot interpret the command sent to the command channel. Typically caused by an illegal number of file names or pattern matching illegally used.

31. **SYNTAX ERROR** (invalid command)
The DOS does not recognize the command. The command must start in the first position.

32. **SYNTAX ERROR** (long line)
The command sent is longer than 58 characters.

33. **SYNTAX ERROR** (invalid file name)
Pattern matching is illegally used in the DOPEN or DSAVE command.

34. **SYNTAX ERROR** (no file given)
The file name was left out of a command or the DOS does not recognize it as such. Typically a colon has been left out of the command.

39. **SYNTAX ERROR** (invalid command)
This error may result if the command sent to the command channel (secondary address 15) is unrecognizable by the DOS.

50. **RECORD NOT PRESENT**
Result of disk reading past the last record via INPUT# or GET# commands. This message will also occur after positioning to a record beyond end of file in a relative file. If the intent is to expand the file by adding the new record (with a PRINT# command), the error message may be ignored. INPUT or GET should not be attempted after this error is detected without first repositioning to a valid record number.

51. OVERFLOW IN RECORD

Data written with a PRINTS statement exceeds the defined relative record size. Data is truncated to the defined size. Typical cause is failing to include carriage returns sent as a field or record terminators in calculating the record size.

52. FILE TOO LARGE

Record position within a relative file indicates that not enough blocks remain available on the disk to contain the specified number of records.

60. WRITE FILE OPEN

This message is generated when a write file that has not been closed is being opened for reading.

61. FILE NOT OPEN

This message is generated when a file is being accessed that has not been opened in the DOS. Sometimes, in this case, a message is not generated; the request is simply ignored.

62. FILE NOT FOUND

The requested file does not exist on the indicated drive.

63. FILE EXISTS

The file name of the file being created already exists on the disk.

64. FILE TYPE MISMATCH

The file type on a DOPEN command does not match the file type in the directory entry for the requested file.

65. NO BLOCK

This message occurs in conjunction with the B-A command. It indicates that the block to be allocated has been previously allocated. The parameters indicate the next higher track and sector number available. If the parameters are zeros, then all higher numbered blocks are in use.

66. ILLEGAL TRACK AND SECTOR

The DOS has attempted to access a track or sector which does not exist in the format being used. This may indicate a problem reading the pointer to the next block.

67. ILLEGAL SYSTEM T OR S

Special error message indicating an illegal System track or sector.

70. **NO CHANNEL** (available)
The requested channel is not available or all channels are in use. A maximum of five sequential files or three relative files may be opened at one time to the DOS. Direct access channels may have six opened files.

71. **DIRECTORY ERROR**
The BAM does not match the internal count. There is a problem in the BAM allocation or the BAM has been overwritten in DOS memory. To correct this problem, reinitialize the disk to restore the BAM in memory. Active files may be terminated by the corrective action. (BAM designates Block Availability Map).

72. **DISK FULL**
Either all blocks on the disk are used or the directory is at its limit. DISK FULL is sent when two blocks remain available to allow the current file to be closed.

73. **DOS MISMATCH**
DOS 1 and 2 are read compatible but not write compatible. Disks may be interchangeably read with either DOS, but a disk formatted on one version cannot be written upon with the other version because the format is different. This error is displayed whenever an attempt is made to write upon a disk which has been formatted in a noncompatible format. (A utility routine is available to assist in converting one format to another). This message may also appear after power up.

74. **DRIVE NOT READY**
An attempt has been made to access an invalid device number or the disk drive is not powered up or the disk drive is not up to speed or there is no diskette in the drive being accessed.

75. **FORMAT SPEED ERROR**
while formatting diskettes, the drive verifies that drive speed is within 2 milliseconds (1%) of being 200 milliseconds per revolution. If speed is outside that tolerance, the formatting is halted with the disk error light on.

76. **CONTROLLER ERROR**
A variety of conditions indicating controller hardware problems.

APPENDIX B

I R S FORMS AND SCHEDULES SUPPORTED

TAXPERFECT-64 AND TAXPERFECT-128

FORM 1040A
U.S. INDIVIDUAL INCOME TAX RETURN

SCHEDULE 1
(FORM 1040A)

SCHEDULE 2
(FORM 1040A)

SCHEDULE 3
(FORM 1040A)

SCHEDULE EIC-A
(FORM 1040A)

FORM 1040
U.S. INDIVIDUAL INCOME TAX RETURN

SCHEDULE A
ITEMIZED DEDUCTIONS

SCHEDULE B
INTEREST AND DIVIDEND INCOME

SCHEDULE C
PROFIT OR (LOSS) FROM BUSINESS OR PROFESSION
(Sole Proprietorship)

SCHEDULE D
CAPITAL GAINS AND LOSSES AND RECONCILIATION OF FORMS 1099-B

SCHEDULE E
SUPPLEMENTAL INCOME SCHEDULE
(From rents, royalties, partnerships,
S-corps estates, trusts, REMICs, etc.)

SCHEDULE SE
COMPUTATION OF SOCIAL SECURITY SELF-EMPLOYMENT TAX

FORM 2441
CREDIT FOR CHILD AND DEPENDENT CARE EXPENSES

FORM 3903
MOVING EXPENSES

FORM 6251
ALTERNATIVE MINIMUM TAX - INDIVIDUALS

FORM 8615
TAX FOR CHILDREN UNDER AGE 14

FORM 8815
EXCLUSION OF INTEREST FROM SERIES EE U.S. SAVINGS BONDS ISSUED AFTER 1989

SCHEDULE EIC
EARNED INCOME CREDIT

TAXPERFECT-128 ONLY

SCHEDULE F
FARM INCOME AND EXPENSES

SCHEDULE R
CREDIT FOR THE ELDERLY OR THE PERMANENTLY AND TOTALLY DISABLED

FORM 2106
EMPLOYEE BUSINESS EXPENSES

FORM 2119
SALE OR EXCHANGE OF PRINCIPAL RESIDENCE

FORM 2210
UNDERPAYMENT OF ESTIMATED TAX BY INDIVIDUALS AND FIDUCIARIES

FORM 3800
GENERAL BUSINESS CREDIT

FORM 4136
COMPUTATION OF CREDIT FOR FEDERAL TAX ON GASOLINE AND SPECIAL FUELS

FORM 4255
RECAPTURE OF INVESTMENT CREDIT

FORM 4562
DEPRECIATION AND AMORTIZATION

FORM 4684
CASUALTIES AND THEFTS

FORM 8396
MORTGAGE INTEREST CREDIT

APPENDIX C

I R S FORMS AND SCHEDULES SUPPORTED

TAXPERFECT-64 AND TAXPERFECT-128

FORM 1040A
U.S. INDIVIDUAL INCOME TAX RETURN

APPLICATION: Form 1040A is used by citizens and residents of the United States to report income tax. You may use this form if:

- Your taxable income is less than $50,000.
- You have no itemized deductions.
- The only adjustment to income is the deduction for certain contributions to an IRA.
- You had only wages, salaries, tips, taxable scholarships or fellowships, interest, dividend and unemployment compensation income.
- See IRS instructions for other requirements.

SCHEDULE 1
(FORM 1040A)

APPLICATION: Schedule 1 is to be completed and attached to Form 1040A only if you:

- Have over $400 of taxable interest income (Part I).
- Have over $400 of dividend income (Part II).

SCHEDULE 2
(FORM 1040A)

APPLICATION: Schedule 2 is used to calculate, report and claim credit for expenses incurred for child and dependent care in order to be gainfully employed or to look for gainful employment. The most that the credit may be is $720 for the care of one child or qualifying person and $1440 for the care of two or more qualifying persons. Do not enter more than the maximum expense amount of $2,400 for the care of one qualifying person or more than $4,800 for the care of two or more qualifying persons on line 5 of Schedule 2.

SCHEDULE 3
(FORM 1040A)

APPLICATION: Schedule 3 of the Form 1040A is used to calculate the special tax credit for the elderly, for individuals 65 or over, and for individuals under 65 who retired as permanently and totally disabled taxpayers who received taxable disability income. Some elderly people can take a special tax credit and pay less tax. The credit is based on the taxpayer's filing status, age and, if married and filing a joint return, on the age of the spouse. Also, certain disabled people may be able to take this special credit to reduce their tax.

SCHEDULE EIC-A
(FORM 1040A)

APPLICATION: Schedule 4 of the Form 1040A is a special credit that can help some people who have a child. The credit is now made up of these three credits: basic credit, health insurance credit and credit for a child born in 1992. You may take the earned income credit if **all** of the following apply to you:

- Line 32 of Form 1040A MUST be LESS than $22,370.
- Filing status cannot be Married Filing Separately.
- You MUST have a qualifying child.
- You do not file Form 2555, Foreign Earned Income.
- You are not a qualifying child of another person.

FORM 1040
U.S. INDIVIDUAL INCOME TAX RETURN

APPLICATION: This form is used by citizens and residents of the United States to report income tax. The Form 1040 is the mainstay to every income tax return and assembles and computes the results of calculations which flow to the appropriate lines from its supporting Schedules and from the applicable forms. The indicated format is to activate and make the entries to the Forms and Schedules first. When you come to make entries to your Form 1040, the applicable data shall have already transferred to the Form 1040, ready for your final computation of taxable income and the resultant tax or refund due.

SCHEDULE A
ITEMIZED DEDUCTIONS

APPLICATION: Schedule A of the Form 1040 is used to report itemized allowable deductions for interest expense, casualty and theft losses, taxes, medical and dental expenses, unreimbursed employee business expenses, moving expenses, contributions and other allowable miscellaneous expenses which exceed the standard deduction permitted by the IRS.

SCHEDULE B
INTEREST AND DIVIDEND INCOME

APPLICATION: Schedule B of the Form 1040 is used to list and to report gross earnings in the form of taxable interest and dividend income; it is required to be filed when gross earnings from either taxable interest or dividend income are in excess of $400; if you have a foreign account or you were a grantor of- or transferor to- a foreign trust.

SCHEDULE C
PROFIT OR (LOSS) FROM BUSINESS OR PROFESSION
(Sole Proprietorship)

APPLICATION: Schedule C of the Form 1040 is used to calculate and to report income or (loss) of individual taxpayers from operating an unincorporated business or profession (sole proprietorship). Entries made to Schedule C are automatically transferred to the Form 1040. An unlimited number of Schedule Cs may be prepared for any one taxpayer. When preparing a tax return which will include more than 1 Schedule C, you should prepare all of the Schedule Cs first; then **total** net income (or loss) from the Schedule Cs should be entered with a calculation **override** to the appropriate line (13) of the Form 1040. (See Appendix E for complete listing of IRS Business Codes).

SCHEDULE D
CAPITAL GAINS AND LOSSES AND RECONCILIATION
OF FORMS 1099-B

APPLICATION: Schedule D of the Form 1040 is used to report details of gains and (losses) realized as a result of the sale, exchange or disposition of capital assets; to reconcile Forms 1099-B (other than real estate transactions) with the tax return and to consolidate any gains and (losses) resulting from the sale or the exchange of a principal residence (Form 2119); from principal received on installment sales made (Form 6252); from the sale, exchange or involuntary conversion of noncapital assets that are not held

in compute post-1969 loss carryovers from 1987 to 1988, etc. Consult IRS Instructions for Schedule D for a complete listing of the items which should be reported on Schedule D.

SCHEDULE E
SUPPLEMENTAL INCOME SCHEDULE
(From rents, royalties, partnerships,
estates, trusts, REMICs, etc.)

APPLICATION: Schedule E of the Form 1040 is used to report details of income and (losses) realized from rental properties; from properties on which royalties are received; from partnerships; from S corporations; from estates and trusts; from REMICs (Real Estate Mortgage Investment Conduits) and to summarize Windfall Profit Tax.

NOTE: Entries made to in response to prompts to enter the amount of **losses** on Schedule E on **Page 1**-Part I, line 24; **Page 2**-Part II, Column F, H, I; Part III, Column C, E; and Part IV, Column D should be entered **without** minus signs, for example a $1000 loss need not be entered as **-1000.**

SCHEDULE SE
COMPUTATION OF SOCIAL SECURITY SELF-EMPLOYMENT TAX

APPLICATION: Schedule SE of the Form 1040 is used to calculate a taxpayer's self-employment tax liability for earnings from self-employment which are $400 or greater, including partnership, Schedule C or Schedule F self-employment income **or** which are $100 or greater if you were an employee of an electing church or church-controlled organization.

FORM 2441
CREDIT FOR CHILD AND DEPENDENT CARE EXPENSES

APPLICATION: Form 2441 is used to calculate, report and claim credit for expenses incurred for child and dependent care in order to be gainfully employed or to look for gainful employment. The most that the credit may be is $720 for the care of one qualifying person and $1440 for the care of two or more qualifying persons. Do not enter more than the maximum expense amount of $2400 for the care of one qualifying person or more than $4800 for the care of two or more qualifying persons on line 2 of the Form 2441. Consult the IRS Instructions which accompany the Form 2441 for definition of "qualifying person" and complete information concerning this form.

FORM 3903
MOVING EXPENSES

APPLICATION: Form 3903 is for optional use to support deductions from income for expenses for travel, transportation (including meals and lodging) and certain expenses of selling an old residence and buying a new residence for employees and self-employed individuals moving to a new job location in the United States or its possessions. Form 3903 is used to report and claim allowable moving expenses for a move resulting from a change in location of taxpayer's employment, subject to qualifying tests, e.g., with respect to distance, time, etc. Such a move of your residence because of a change in the location of your job may be within the United States or its possessions; it may also be available as a deduction whether you are self-employed or an employee. A more complete explanation of the qualification parameters to be met can be found in the IRS Instructions accompanying the Form 3903.

FORM 6251
ALTERNATIVE MINIMUM TAX - INDIVIDUALS

APPLICATION: Form 6251 is used by individuals to report tax preference items and to figure their alternative tax liability. It is used to determine if you are liable for the Alternative Minimum Tax; it should be attached to your return and filed if you **are** liable for the Alternative Minimum Tax **or** you have credits that are limited by the tentative minimum tax. Consult Publication 909 and IRS Instructions for Form 6251 for complete listing of items which should be reported on Form 6251.

FORM 8615
TAX FOR CHILDREN UNDER AGE 14

APPLICATION: Form 8615 is used to figure the tax on unearned investment income of more than $1,000 belonging to a child under age 14 on January 1, 1992 unless neither parent was alive on December 31, 1990. For a child under 14, investment income over $1,000 is taxed at the parent's rate if the parent's rate is higher than the child's rate. Form 8615 is attached to the child's Form 1040 or Form 1040A.

FORM 8815
EXCLUSION OF INTEREST FROM SERIES EE U.S. SAVINGS BONDS ISSUED AFTER 1989

APPLICATION: Form 8815 is used by an individual who pays qualified higher education expenses during a tax year and excludes from that year's gross income, subject to certain limits, any income from the redemption of U.S. Savings Bonds issued after 1989. A married individual must file a joint return to get the exclusion.

APPENDIX D

I R S FORMS AND SCHEDULES SUPPORTED

TAXPERFECT-128 ONLY

SCHEDULE EIC
EARNED INCOME CREDIT

APPLICATION: Schedule EIC of the Form 1040 is a special credit that can help some people who have a child. The credit is now made up of these three credits: basic credit, health insurance credit and credit for a child born in 1992. You may take the earned income credit if **all** of the following apply to you:

- Line 32 of Form 1040 MUST be LESS than $22,370.
- Filing status cannot be Married Filing Separately.
- You MUST have a qualifying child.
- You do not file Form 2555, Foreign Earned Income.
- You are not a qualifying child of another person.

SCHEDULE F
FARM INCOME AND EXPENSES

APPLICATION: Schedule F of the Form 1040 is used to report income or (losses) and expenses realized from or related to farming operations if you file Forms 1040, 1041, 1041S or 1065. Consult IRS Instructions for Schedule F for a complete listing of the items of income and expense which should be reported on Schedule F. (See Appendix D for a complete listing of IRS Business Codes).

SCHEDULE R
CREDIT FOR THE ELDERLY OR THE PERMANENTLY AND TOTALLY DISABLED

APPLICATION: Schedule R of the Form 1040 is used to calculate the special tax credit for the elderly, for individuals 65 or over, and for individuals under 65 who retired as permanently and totally disabled taxpayers who received taxable disability income. Some elderly people can take a special tax credit and pay less tax. The credit is based on the taxpayer's Filing Status, age and, if married and filing a joint return, on the age of the spouse. Also, certain disabled people may be able to take this special credit to reduce their tax. Consult the IRS Instructions for Schedule R for complete information.

FORM 2106
EMPLOYEE BUSINESS EXPENSES

APPLICATION: The Form 2106 is used to report and to support a taxpayer employee's deductible business expenses attributable to his or her job, both those reimbursed by the employer to the taxpayer and those that were not reimbursed by the employer to the taxpayer, including costs of travel, transportation, outside salesperson (except moving expenses).

FORM 2119
SALE OR EXCHANGE OF PRINCIPAL RESIDENCE

APPLICATION: The Form 2119 is used to report the sale or exchange of an individual taxpayer's principal residence. It is also used by those individuals 55 years of age or older who elect to exclude gain on the sale of their principal residence. The three supplemental questions designated in the input section by asterisks are to aid in the determination of the long- or short-term nature of the transaction. Please refer to the IRS Instructions for Form 2119 for complete information.

FORM 2210
UNDERPAYMENT OF ESTIMATED TAX
BY INDIVIDUALS AND FIDUCIARIES

APPLICATION: The Form 2210 is used by individuals or fiduciaries to determine whether or not they paid enough estimated tax and, if they did not, to compute the amount of penalty due as a result of the underpayment of taxes during the year of 1992. When this manual was ready to be printed, the IRS had not yet issued the Form 2210 in its final form. The input request prompts on screen and the printer's positioning of the output of those items entered in response to those prompts is based on the then-latest proof "AS OF DECEMBER 21, 1992 - SUBJECT TO CHANGE". Accordingly, if the proof, as it was then, is further changed, your output will not print correctly to the amended Form 2210. This form is already considered one of the IRS's more complicated. You are urged to consult and carefully read and follow the Instructions furnished by the IRS with its final version of the Form 2210.

FORM 3800
GENERAL BUSINESS CREDIT

APPLICATION: The Form 3800 is used to compute and report the amount of General Business Credit available FYE 1992 and to determine the applicable limitation on this credit, based on taxpayer's tax liability. The General Business Credit is comprised of the Investment Credit (Form 3468); Jobs Credit (Form 5884); Credit For Alcohol Used As Fuel (Form 6478); Credit For Increasing Research Activities and For Claiming the Orphan Drug Credit (Form 6765) and Low-Income Housing Credit (Form 8586) and Employee Stock Ownership Plan (ESOP) Credit (Form 8007) or to report carrybacks or carryforwards of any of these credits. Consult IRS Instructions for the Form 3800 for complete information concerning the use of this form.

FORM 4136
COMPUTATION OF CREDIT FOR FEDERAL TAX ON GASOLINE AND SPECIAL FUELS

APPLICATION: Form 4136 is used by individuals, estates, trusts or corporations, including S corporations, and interest charge DISCs to calculate and claim credit for Federal excise tax on the number of gallons of gasoline, gasohol, diesel fuel and other special fuels used for certain types of business uses or the credit for the purchase of qualified diesel-powered highway vehicles. Consult IRS Instructions for the Form 4136 for complete information concerning the use of this form.

FORM 4255
RECAPTURE OF INVESTMENT CREDIT

APPLICATION: Form 4255 is used by individuals, estates, trusts or corporations to calculate the tax due on the recapture of investment tax credit arising out of the disposition, return, change in percentage business use or in use status of regular or energy property on which the taxpayer had previously taken or claimed an investment tax credit. When such property ceases to be "qualified" property, e.g., property disposed of before the end of the useful life used in computing the credit or property for which the percentage of **business** use decreases, the tax must be increased if the credit allowed is more than the credit allowable at the time of disposition. Consult IRS instructions for the Form 4255 for complete information on the rules governing recapture of investment tax credit.

FORM 4562
DEPRECIATION AND AMORTIZATION

APPLICATION: Form 4562 is used by individuals, estates and trusts, partnerships and corporations claiming depreciation, amortization and Section 179 expense deduction to calculate and claim the deductions for depreciation and amortization and to elect the expensing of recovery property as well as to furnish information detailing the business use of automobiles and other listed property placed in service after June 18, 1984. Consult IRS Instructions for the Form 4562 for complete information on the rules governing the use of this form.

NOTE: It is suggested that you use the **TAXPERFECT DEPRECIATION** stand-alone program to generate the detailed listing of the Schedules which you will attach to your Form 4562 before completing your Form 4562. It will provide you with substantial summary detail for the completion of this form.

FORM 4684
CASUALTIES AND THEFTS

APPLICATION: Form 4684 is used to calculate and report gains and claim the deduction for losses sustained or resulting from fire, storm, shipwreck, etc. and/or other casualty occurrences or from losses sustained from thefts of your property, i.e., by burglary, larceny, embezzlement, robbery, etc. Allowable losses from qualifying forms of casualty or theft are limited in their deductibility to the extent that they exceed 10% of your adjusted gross income, i.e., the amount must be in excess of 10% of your AGI and is reduced by 10% of your AGI before any of it is deductible. Consult IRS Instructions for the Form 4684 for complete information concerning the use of this form.

FORM 4952
INVESTMENT INTEREST EXPENSE DEDUCTION

APPLICATION: Form 4952 is used by individuals, estates and trusts to figure the deduction limitation for interest expense on funds borrowed to purchase or carry property held for investment. Form 4952 is used to figure the amount of investment interest expense deductible for the current year and the amount, if any, to carry forward to future years.

FORM 8396
MORTGAGE INTEREST CREDIT

APPLICATION: Form 8396 is used by an individual who holds a qualified mortgage credit certificate issued by a state or local government unit or agency to figure the mortgage interest credit allowed for the current year and any carryforward to the following year. You must complete Form 6251, Alternative Minimum Tax, before using this form.

APPENDIX E

I R S BUSINESS CODES

FOR SCHEDULE C (Form 1040)

CONSTRUCTION

Construction, Building and Repairs Trades

CODE	DESCRIPTION
0018	Operative builders (building for own account)

General Contractors

CODE	DESCRIPTION
0059	Residential building
0059	Nonresidential building
0075	Highway and street construction
3889	Other heavy construction (pipe laying, bridge construction, etc.)

Building Trade Contractors, Including Repairs

CODE	DESCRIPTION
0232	Plumbing, heating, air conditioning
0257	Painting and paper hanging
0273	Electrical work
0299	Masonry, dry wall, stone, tile
0414	Carpentering and flooring
0430	Roofing, siding and sheet metal
0455	Concrete work
0471	Water well drilling
0885	Other building trade contractors (excavation, glazing, etc.)

MANUFACTURING, INCLUDING PRINTING AND PUBLISHING

CODE	DESCRIPTION
0612	Bakeries, selling at retail
0638	Other food products and beverages
0653	Textile mill products

0679	Apparel and other textile products
0695	Leather, footwear, handbags, etc.
0810	Furniture and fixtures
0836	Lumber and other wood products
0851	Printing and publishing
0877	Paper and allied products
0893	Chemicals and allied products

CODE	DESCRIPTION
1016	Rubber and allied products
1032	Stone, clay and glass products
1057	Primary metal industries
1073	Fabricated metal products
1099	Machinery and machine shops
1115	Electric and electronic equipment
1313	Transportation equipment
1339	Instruments and related products
1883	Other manufacturing industries

MINING AND MINERAL EXTRACTION

CODE	DESCRIPTION
1511	Metal mining
1437	Coal mining
1552	Oil and gas
1719	Quarrying and nonmetallic mining

AGRICULTURAL SERVICES, FORESTRY AND FISHING

CODE	DESCRIPTION
1917	Soil preparation services
1933	Crop services
1958	Veterinary services, including pets
1974	Livestock breeding
1990	Other animal services
2113	Farm labor and management services
2212	Horticulture and landscaping
2238	Forestry, except logging
0836	Logging
2279	Fishing, hunting and trapping

WHOLESALE TRADE - SELLING GOODS TO OTHER BUSINESSES, GOVERNMENT OR INSTITUTIONS

Durable Goods Including Machinery, Equipment, Wood, Metals, Etc.

CODE	DESCRIPTION
2618	Selling for your own account
2634	Agent or broker for other firms-more than 50% of gross sales on commission

Nondurable Goods Including Food, fiber, chemicals, Etc.

CODE	DESCRIPTION
2659	Selling for your own account
2675	Agent or broker for other firms-more than 50% of gross sales on commission

RETAIL TRADE - SELLING GOODS TO INDIVIDUALS AND HOUSEHOLDS

CODE	DESCRIPTION
3012	Selling door-to-door, by telephone or party plan, or from mobile unit
3038	Catalog or mail order
3053	Vending machine selling

Selling From Store, Showroom or Other Fixed Location

Food, Beverages and Drugs

CODE	DESCRIPTION
3079	Eating places (meals or snacks)
3095	Drinking places (alcoholic beverages)
3210	Grocery stores (general line)
0612	Bakeries selling at retail
3236	Other food stores (meat, produce, candy, etc.)
3251	Liquor stores
3277	Drug stores

Automotive and Service Stations

CODE	DESCRIPTION
3319	New car dealers (franchised)
3335	Used car dealers
3517	Other automotive dealers (motorcycles, recreational vehicles, etc.)
3533	Tires, accessories and parts
3558	Gasoline service stations

General Merchandise, Apparel and Furniture

CODE	DESCRIPTION
3715	Variety stores
3731	Other general merchandise stores
3756	Shoe stores
3772	Men's and boys' clothing stores
3913	Women's ready-to-wear stores
3921	Women's accessory and specialty stores and furriers
3939	Family clothing stores
3954	Other apparel and accessory stores
3970	Furniture stores
3996	TV, audio and electronics stores
3988	Computer hardware and software stores
4119	Household appliance stores
4317	Other home furnishings stores (china floor coverings, drapes, etc.)
4333	Music and record stores

Building, Hardware and Garden Supply

CODE	DESCRIPTION
4416	Building materials dealers
4432	Paint, glass and wallpaper stores
4457	Hardware stores
4473	Nurseries and garden supply stores

Other Retail Stores

CODE	DESCRIPTION
4614	Used merchandise and antique stores (except used motor vehicle parts)
4630	Gift, novelty and souvenir shops

4655	Florists
4671	Jewelry stores
4697	Sporting goods and bicycle shops
4812	Boat dealers
4838	Hobby, toy and game shops
4853	Camera and photo supply stores
4879	Optical goods stores
4895	Luggage and leather goods stores
5017	Bookstores, excluding newsstands
5033	Stationery stores
5058	Fabric and needlework stores
5074	Mobile home dealers
5090	Fuel dealers (except gasoline)
5884	Other retail stores

REAL ESTATE, INSURANCE, FINANCE AND RELATED SERVICES

CODE	DESCRIPTION
5512	Real estate agents and managers
5538	Operators and lessors of buildings (except developers)
5553	Operators and lessors of other real property (except developers)
5710	Subdividers and developers (except cemeteries)
5736	Insurance agents and services
5751	Security and commodity brokers, dealers and investment services
5777	Other real estate, insurance and financial activities

TRANSPORTATION, COMMUNICATIONS, PUBLIC UTILITIES AND RELATED SERVICES

CODE	DESCRIPTION
6114	Taxicabs
6312	Bus and limousine transportation
6338	Trucking (except trash collection)

CODE	DESCRIPTION
6510	Trash collection without own dump
6536	Public warehousing
6551	Water transportation
6619	Air transportation
6635	Travel agents and tour operators

6650	Other transportation and related services
6676	Communication services
6692	Utilities, including dumps, snow plowing, road cleaning, etc.

SERVICES (PROVIDING PERSONAL, PROFESSIONAL AND BUSINESS SERVICES)

Hotels and Other Lodging Places

CODE	DESCRIPTION
7096	Hotels, motels and tourist homes
7211	Rooming and boarding houses
7237	Camps and camping parks

Laundry and Cleaning Services

CODE	DESCRIPTION
7419	Coin-operated laundries and dry cleaning
7435	Other laundry, dry cleaning and garment services
7450	Carpet and upholstery cleaning
7476	Janitorial and related services (building, house and window cleaning)

Business and/or Personal Services

CODE	DESCRIPTION
7617	Legal services (or lawyer)
7633	Income tax preparation
7658	Accounting and bookkeeping
7674	Engineering, surveying and architectural
7690	Management, consulting and public relations
7716	Advertising, except direct mail
7732	Employment agencies and personnel supply
7757	Computer and data processing, including repair and leasing
7773	Equipment rental and leasing except computer or automotive
7914	Investigative and protective services
7880	Other business services

Personal Services

CODE	DESCRIPTION
8110	Beauty shops (or beautician)
8318	Barber shop (or barber)

CODE	DESCRIPTION
8334	Photographic portrait studios
8516	Shoe repair and shine services
8532	Funeral services and crematories
8714	Child day care
8730	Teaching or tutoring
8755	Counselling (except health practitioners)
8771	Ministers and chaplains
6882	Other personal services

Automotive Services

CODE	DESCRIPTION
8813	Automotive rental or leasing, without driver
8839	Parking, except valet
8854	General automotive repairs
8870	Specialized automotive repairs (brake, body repairs, paint, etc.)
8896	Other automotive services (wash, towing, etc.)

Miscellaneous Repair, Except Computers

CODE	DESCRIPTION
9019	TV and audio equipment repair
9035	Other electrical equipment repair
9050	Reupholstery and furniture repair
2881	Other equipment repair

Medical and Health Services

CODE	DESCRIPTION
9217	Offices and clinics of medical doctors (MDs)
9233	Offices and clinics of dentists
9258	Osteopathic physicians and surgeons
9274	Chiropractors
9290	Optometrists
9415	Registered and practical nurses

9431	Other licensed health practitioners
9456	Dental laboratories
9472	Nursing and personal care facilities
9886	Other health services

Amusement and Recreational Services

CODE	DESCRIPTION
8557	Physical fitness facilities
9613	Videotape rental stores
9639	Motion picture theaters
9654	Other motion picture and TV film and tape activities
9670	Bowling alleys

CODE	DESCRIPTION
9696	Professional sports and racing including promoters and managers
9811	Theatrical performers, musicians, agents producers, and related services
9837	Other amusement and recreational services

8888	Unable to classify

APPENDIX F

I R S BUSINESS CODES

FOR SCHEDULE F (Form 1040)

PRINCIPAL AGRICULTURAL ACTIVITY CODES

CODE	DESCRIPTION
120	**Field crop,** including grains and nongrains such as cotton, peanuts, feed corn, wheat, tobacco, Irish potatoes, etc.
160	**Vegetables and melons,** garden-type vegetables and melons, such as sweet corn, tomatoes, squash, etc.
170	**Fruit and tree nuts,** including grapes, berries, olives, etc.
180	**Ornamental floriculture and nursery products**
185	**Food crops grown under cover,** including hydroponic crops
211	**Beefcattle feedlots**
215	**Hogs, sheep and goats**
240	**Dairy**
250	**Poultry and eggs,** including chickens, ducks, pigeons, quail, etc.
260	**General livestock,** not specializing in any one livestock category
270	**Animal specialty,** including fur-bearing animals, pets, horses, etc.
280	**Animal aquaculture,** including fish, shellfish, mollusks, frogs, etc., produced within confined space
290	**Forest products,** including forest nurseries and seed gathering, extraction of pine gum and gathering of forest products
300	**Agricultural production,** not specified

APPENDIX G

TAXPERFECT-64 SCREENS

SCREEN NO. 1

SUPERTAX-64 V.1987B

(C) COPYRIGHT

1983,1984,1985,1986,1987,1988

FINANCIAL SERVICES MARKETING

CORPORATION

SCREEN NO. 2

TAXPERFECT-64 1987 WAITING

(MFJ)

1040:

-------- 1040 TOP ---------	------	-
YOUR FIRST NAME & INITIAL		
SPOUSE'S FIRST NAME & INIT.		

(ENTER TEXT)

INSERT DATA DISK

PRESS ANY KEY TO CONTINUE

SCREEN NO. 3

```
TAXPERFECT-64          1987                WAITING

      FORMS                    CURRENT VALUES

@ - [1040]                     ADJ. GROSS INCOME
A - [  A ]                      20000
B - [  B ]
C - [  C ]                     TAXABLE INCOME
D - [  D ]                      16240
E - [  E ]
F - [ SE ]                     CREDITS
G - [2441]                      0
H - [3903]
I - [6251]                     TOTAL TAX
                                2314

                               TOTAL PAYMENTS
                                0

                               DUE/(REFUND)
                                2314
          TYPE LETTER TO SELECT FORM

          PRESS <-- TO ABORT
```

SCREEN NO. 4

TAXPERFECT-64 1987 WAITING

NO DATA FILES

ENTER NEW FILE NAME

SDDT:

(ENTER TEXT)

PRESS ← TO ABORT

SCREEN NO. 5

TAXPERFECT-64 1987 WORKING

(MFJ)

1040:7

TOTAL EXEMPTIONS	0	C
[illegible]	20000	
TAXABLE INTEREST INCOME	0	C

20000

(ENTER AMOUNT)

CALCULATING

HOLD [illegible] KEY FOR SCREEN #2

SCREEN NO. 6

TAXPERFECT-64 1987 WAITING

(MFJ)

1040:6

1$ TO CAMP. FUND (SPOUSE)	N/A
EXEMPTIONS (SUB-TOTAL)	[illegible]
EXEMPT (YOU)	N/A

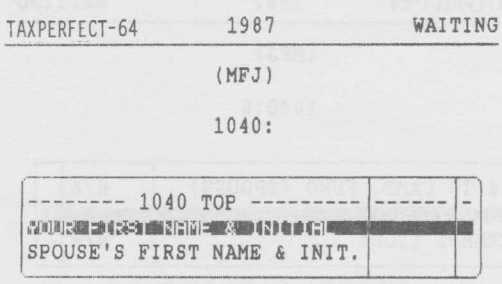
CAUTION: 1 OVERRIDE

$

(ENTER AMOUNT)

HOLD COMMODORE KEY FOR SCREEN #2

SCREEN NO. 7


TAXPERFECT-64 1987 WAITING
(MFJ)
1040:
-------- 1040 TOP ---------
YOUR FIRST NAME & INITIAL
SPOUSE'S FIRST NAME & INIT.
(ENTER TEXT)
NOT A DATA DISK
PRESS ANY KEY TO CONTINUE

SCREEN NO. 8

TAXPERFECT-64 1987 WAITING

(MFJ)

1040:

-------- 1040 TOP ---------	------	-
[redacted]	[redacted]	
SPOUSE'S FIRST NAME & INIT.		

[redacted]

(ENTER TEXT)

OK TO FORMAT DATA DISK? (Y/N)

PRESS ANY KEY TO CONTINUE

SCREEN NO. 9

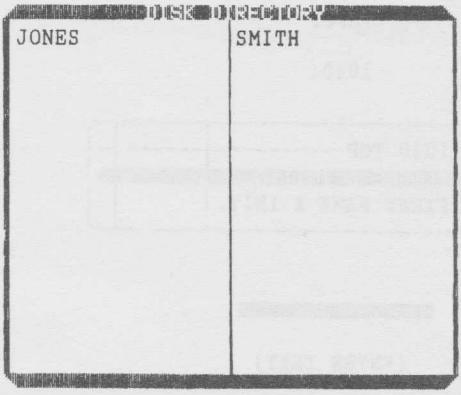
TAXPERFECT-64 1987 WAITING

NO DATA FILES

PRESS ANY KEY TO CONTINUE

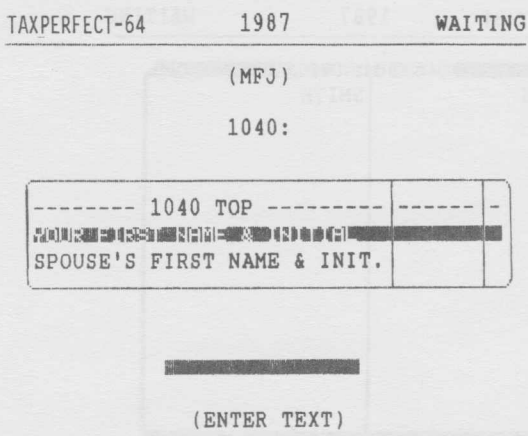
SCREEN NO. 10

TAXPERFECT-64 1987 WAITING



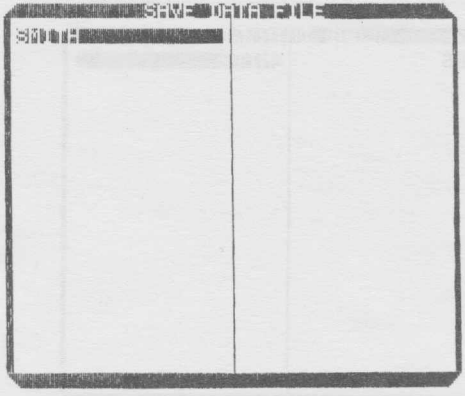
PRESS ANY KEY TO CONTINUE

SCREEN NO. 11


TAXPERFECT-64 1987 WAITING
(MFJ)
1040:
-------- 1040 TOP ---------
SPOUSE'S FIRST NAME & INIT.
(ENTER TEXT)
REMOVE PROGRAM DISK
PRESS ANY KEY TO CONTINUE

SCREEN NO. 12

TAXPERFECT-64 1987 WAITING



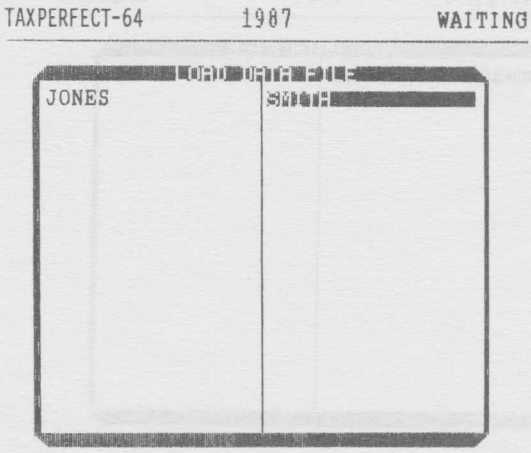
SELECT FILE OR ENTER NEW NAME

JONES

(ENTER TEXT)

PRESS ← TO ABORT

SCREEN NO. 13

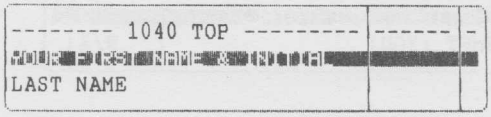

TAXPERFECT-64 1987 WAITING
LOAD DATA FILE
JONES
SMITH
SELECT FILE TO LOAD
PRESS ← TO ABORT

SCREEN NO. 14

TAXPERFECT-64 1987 WAITING

(MFS)

1040:



(ENTER TEXT)

SINGLE SHEET

PRESS ANY KEY TO CONTINUE

SCREEN NO. 15

TAXPERFECT-64 1987 WAITING

(MFJ)

1040:6

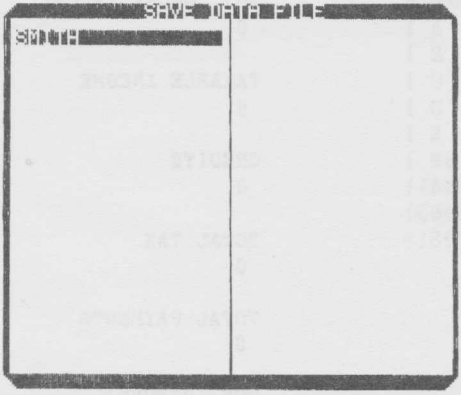
1$ TO CAMP. FUND (SPOUSE)	N/A
EXEMPTIONS (SUB-TOTAL)	0
EXEMPT (YOU)	N/A

0

(CALCULATED VALUE)

HOLD COMMODORE KEY FOR SCREEN #2

TAXPERFECT-64 1987 WORKING



SAVING DATA FILE

```
TAXPERFECT-64          1987                WAITING
-------------------------------------------------------

   FORMS                    CURRENT VALUES

[1040]                      ADJ. GROSS INCOME
[  A  ]                      0
[  B  ]
[  C  ]                     TAXABLE INCOME
[  D  ]                      0
[  E  ]
[ SE  ]                     CREDITS
[2441]                       0
[3903]
[6251]                      TOTAL TAX
                             0

                            TOTAL PAYMENTS
                             0

                            DUE/(REFUND)
                             0

-------------------------------------------------------
```

SCREEN NO. 18

TAXPERFECT-64 1987 WAITING

DATA DRIVE ADDRESS

8: 0

SPACE TO CHANGE

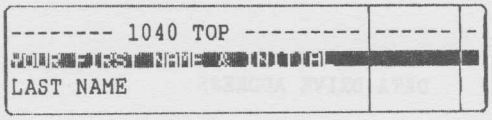
PRESS RETURN TO EXIT

SCREEN NO. 19

TAXPERFECT-64 1987 WAITING

(SINGLE)

1040:



(ENTER TEXT)

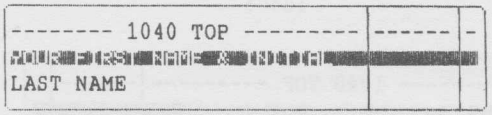
HOLD COMMODORE KEY FOR SCREEN #2

SCREEN NO. 20

TAXPERFECT-64 1987 WAITING

(HOH)

1040:

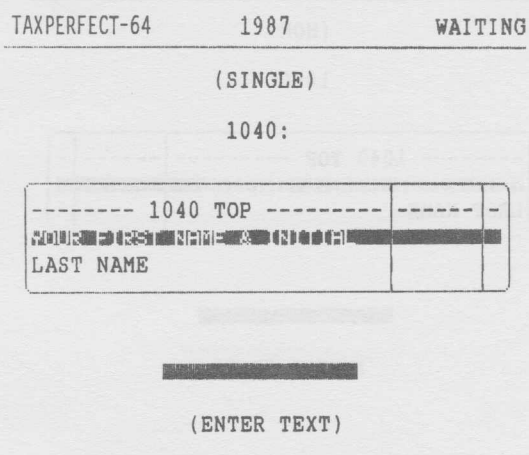


(ENTER TEXT)

OK EXIT TAXPERFECT (Y/N)

PRESS ANY KEY TO CONTINUE

SCREEN NO. 21


TAXPERFECT-64 1987 WAITING
(SINGLE)
1040:
-------- 1040 TOP ---------
YOUR FIRST NAME & INITIAL
LAST NAME
(ENTER TEXT)
COMMAND MODE
PRESS TO ABORT

SCREEN NO. 22

TAXPERFECT-64 1987 WAITING

JOE SMITH (WIDOW/ER)

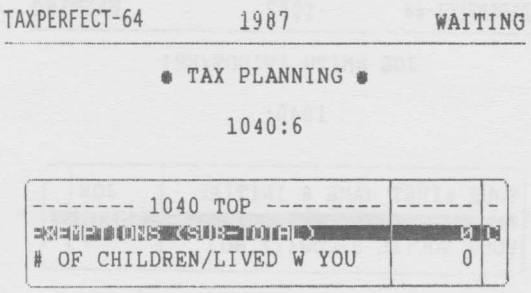
1040:

YOUR FIRST NAME & INITIAL	JOE	
LAST NAME	SMITH	
YOUR SOCIAL SECURITY NO.		

STATE

(ENTER TEXT)

HOLD COMMODORE KEY FOR SCREEN #2


TAXPERFECT-64 1987 WAITING
• TAX PLANNING •
1040:6
-------- 1040 TOP ---------
EXEMPTIONS (SUB-TOTAL)
OF CHILDREN/LIVED W YOU
0
(CALCULATED VALUE)
RETURN PREPARATION MODE
PRESS ANY KEY TO CONTINUE

SCREEN NO. 24

TAXPERFECT-64 1987 WAITING

(MFS)

1040:

(ENTER TEXT)

OK TO BEGIN NEW TAXPAYER? (Y/N)

PRESS ANY KEY TO CONTINUE

SCREEN NO. 25

TAXPERFECT-64 1987 WAITING

(MFS)

1040:

(ENTER TEXT)

TAX PLANNING MODE

PRESS ANY KEY TO CONTINUE

SCREEN NO. 26

TAXPERFECT-64 1987 WAITING

● TAX PLANNING ●

1040:6

-------- 1040 TOP ---------	------	-
EXEMPTIONS(SUB-TOTAL)	0	
# OF CHILDREN/LIVED W YOU	0	

0

(CALCULATED VALUE)

HOLD COMMODORE KEY FOR SCREEN #2

SCREEN NO. 27

TAXPERFECT-64 1987 WAITING

(MFS)

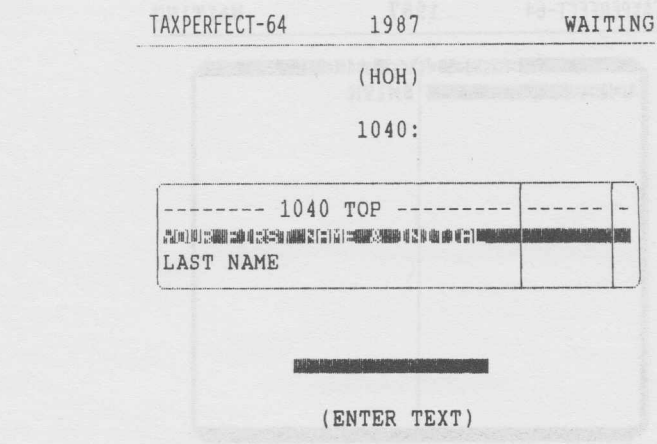
1040:

(ENTER TEXT)

CONTINUOUS FORMS

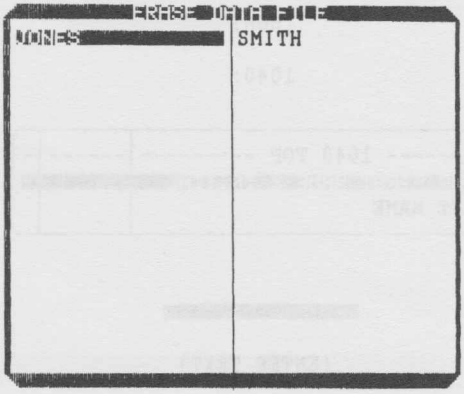
PRESS ANY KEY TO CONTINUE

SCREEN NO. 28


TAXPERFECT-64 1987 WAITING
(HOH)
1040:
-------- 1040 TOP ---------
LAST NAME
(ENTER TEXT)
INSERT DISK IN DRIVE 8:0
PRESS ANY KEY TO CONTINUE

SCREEN NO. 29

TAXPERFECT-64 1987 WAITING



SELECT FILE TO ERASE

PRESS ← TO ABORT

SCREEN NO. 30

TAXPERFECT-64 1987 WORKING

(MFJ)

1040:7

TOTAL EXEMPTIONS	0	C
[redacted]	[redacted]	
TAXABLE INTEREST INCOME	0	C

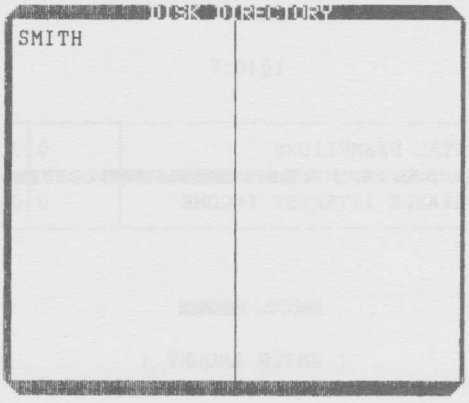
[redacted]

(ENTER AMOUNT)

CALCULATING

HOLD [redacted] KEY FOR SCREEN #2

TAXPERFECT-64 1987 WAITING



PRESS ANY KEY TO CONTINUE

SCREEN NO. 32

TAXPERFECT-64 1987 WAITING

SELECT FILING STATUS

1 - SINGLE

2 - MARRIED FILING JOINTLY

3 - MARRIED FILING SEPARATELY

4 - HEAD OF HOUSEHOLD

5 - QUALIFYING WIDOW(ER)

APPENDIX H

TAXPERFECT-128 SCREENS

SCREEN NO. 1

TAXPERFECT-128 V.1987B

(C) COPYRIGHT
1983,1984,1985,1986,1987,1988

FINANCIAL SERVICES MARKETING
CORPORATION

SCREEN NO. 2

```
1040 TO RAM DISK? (Y/N)
40 SECONDS
```

SCREEN NO. 3

```
SCHEDULES A & B TO RAM DISK? (Y/N)
1 MINUTES 35 SECONDS
```

SCREEN NO. 4

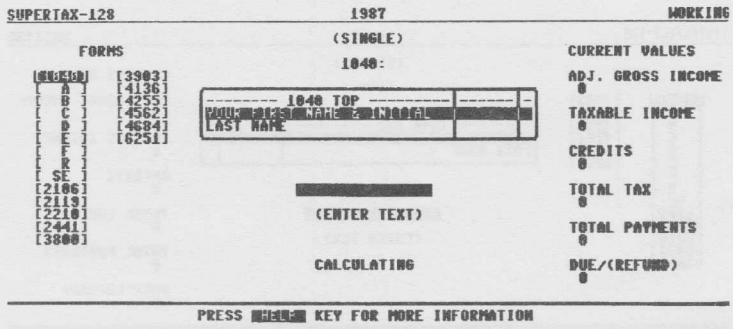
```
SCHEDULES C,D & E TO RAM DISK? (Y/N)
3 MINUTES 25 SECONDS
```

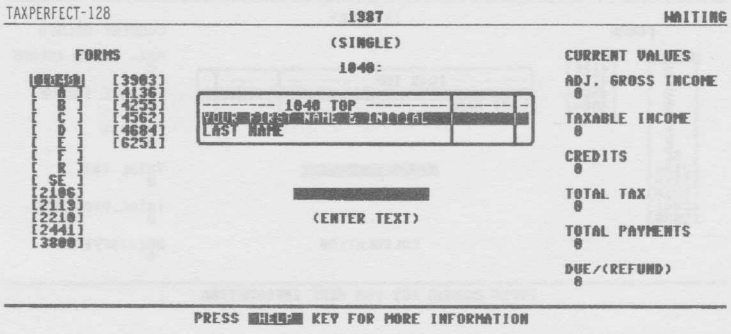
SCREEN NO. 5

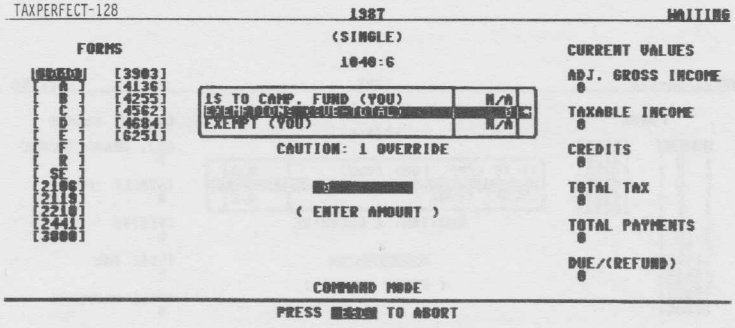
TAXPERFECT-128 **1987** **WAITING**

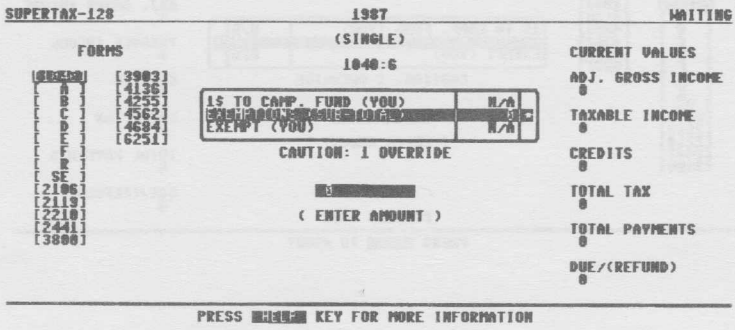
SELECT FILING STATUS

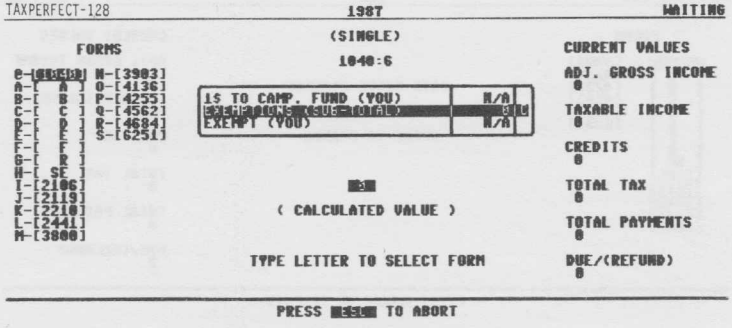
1 - SINGLE
2 - MARRIED FILING JOINTLY
3 - MARRIED FILING SEPARATELY
4 - HEAD OF HOUSEHOLD
5 - QUALIFYING WIDOW(ER)

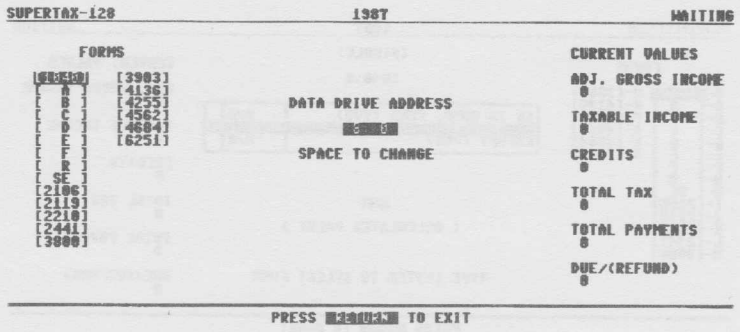

SUPERTAX-128
1987
WORKING
(SINGLE)
FORMS
1040:
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
[1040]
[A]
[B]
[C]
[D]
[E]
[F]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
1040 TOP
FIRST NAME & INITIAL
LAST NAME
(ENTER TEXT)
CALCULATING
PRESS HELP KEY FOR MORE INFORMATION

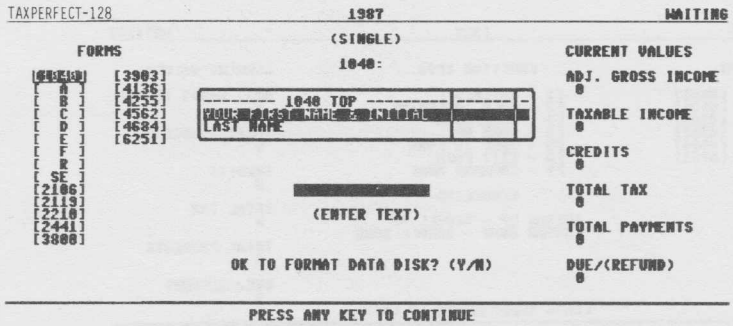

TAXPERFECT-128
1987
WAITING
(SINGLE)
1040:
FORMS
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
[2106]
[2119]
[2210]
[2441]
[3800]
--------- 1040 TOP ----------
YOUR FIRST NAME & INITIAL
LAST NAME
(ENTER TEXT)
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS HELP KEY FOR MORE INFORMATION

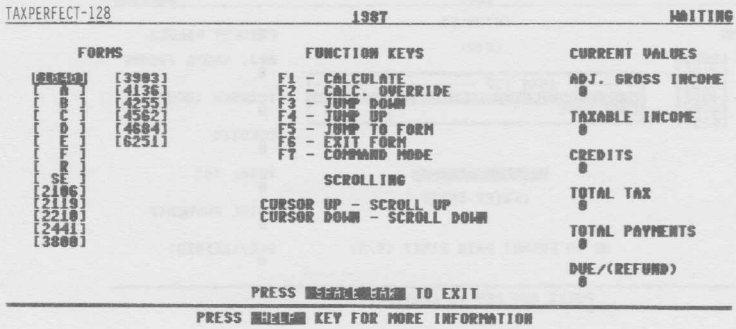

TAXPERFECT-128
1987
WAITING
FORMS
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
[2106]
[2119]
[2210]
[2441]
[3800]
(SINGLE)
1040:G
1$ TO CAMP. FUND (YOU)
N/A
EXEMPT (YOU)
N/A
CAUTION: 1 OVERRIDE
(ENTER AMOUNT)
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
COMMAND MODE
PRESS TO ABORT

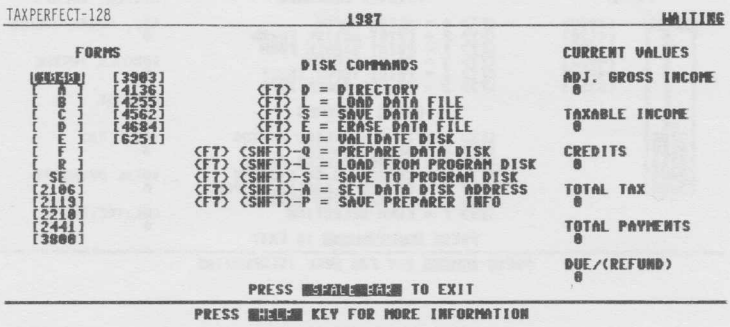

SUPERTAX-128
1987
WAITING
FORMS
[A] [3903]
[B] [4136]
[C] [4255]
[D] [4562]
[E] [4684]
[F] [6251]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
(SINGLE)
1040:G
1$ TO CAMP. FUND (YOU) N/A
EXEMPTIONS/DUE (OTH.) 0
EXEMPT (YOU) N/A
CAUTION: 1 OVERRIDE
0
(ENTER AMOUNT)
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS HELP KEY FOR MORE INFORMATION

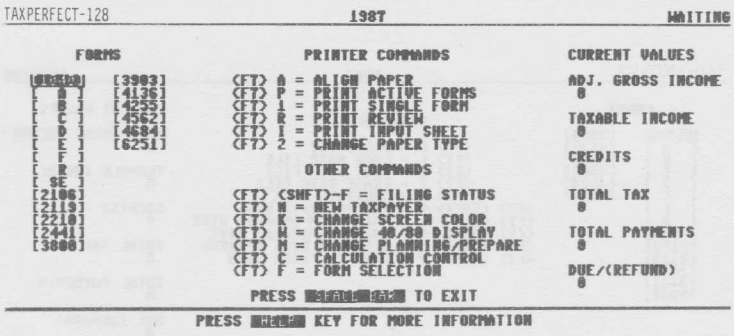

TAXPERFECT-128
1987
WAITING
(SINGLE)
1040:6
FORMS
A-[A]
B-[B]
C-[C]
D-[D]
E-[E]
F-[F]
G-[R]
H-[SE]
I-[2106]
J-[2119]
K-[2210]
L-[2441]
M-[3800]
M-[3903]
O-[4136]
P-[4255]
Q-[4562]
R-[4684]
S-[6251]
1$ TO CAMP. FUND (YOU) N/A
EXEMPTIONS (SUB-TOTAL) 0.00
EXEMPT (YOU) N/A
(CALCULATED VALUE)
TYPE LETTER TO SELECT FORM
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS ESC TO ABORT


SUPERTAX-128
1987
WAITING
FORMS
[1040]
[A]
[B]
[C]
[D]
[E]
[F]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
DATA DRIVE ADDRESS
B:
SPACE TO CHANGE
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS RETURN TO EXIT


TAXPERFECT-128
1987
WAITING
(SINGLE)
FORMS
1040:
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
[2106]
[2119]
[2210]
[2441]
[3800]
1040 TOP
LAST NAME
(ENTER TEXT)
OK TO FORMAT DATA DISK? (Y/N)
PRESS ANY KEY TO CONTINUE

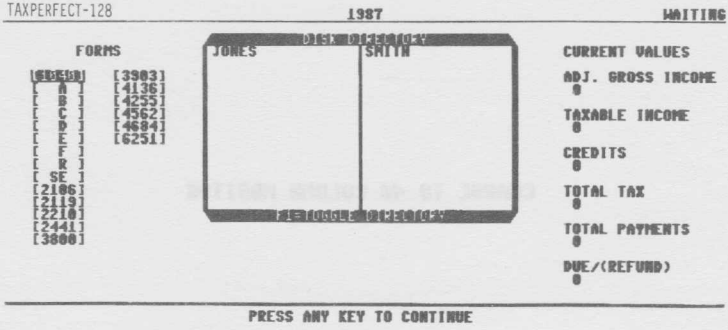

TAXPERFECT-128
1987
WAITING
FORMS
[1040]
[A]
[B]
[C]
[D]
[E]
[F]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
FUNCTION KEYS
F1 - CALCULATE
F2 - CALC. OVERRIDE
F3 - JUMP DOWN
F4 - JUMP UP
F5 - JUMP TO FORM
F6 - EXIT FORM
F7 - COMMAND MODE
SCROLLING
CURSOR UP - SCROLL UP
CURSOR DOWN - SCROLL DOWN
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS TO EXIT
PRESS KEY FOR MORE INFORMATION

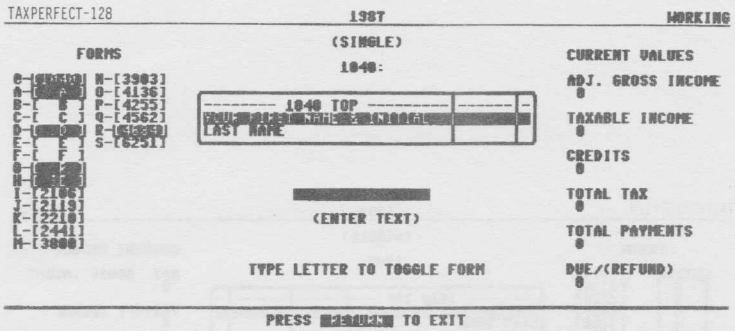

TAXPERFECT-128
1987
WAITING
FORMS
[3903]
[A]
[4136]
[B]
[4255]
[C]
[4562]
[D]
[4684]
[E]
[6251]
[F]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
DISK COMMANDS
(F7) D = DIRECTORY
(F7) L = LOAD DATA FILE
(F7) S = SAVE DATA FILE
(F7) E = ERASE DATA FILE
(F7) V = VALIDATE DISK
(F7) (SHFT)-Q = PREPARE DATA DISK
(F7) (SHFT)-L = LOAD FROM PROGRAM DISK
(F7) (SHFT)-S = SAVE TO PROGRAM DISK
(F7) (SHFT)-A = SET DATA DISK ADDRESS
(F7) (SHFT)-P = SAVE PREPARER INFO
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS SPACE BAR TO EXIT
PRESS HELP KEY FOR MORE INFORMATION

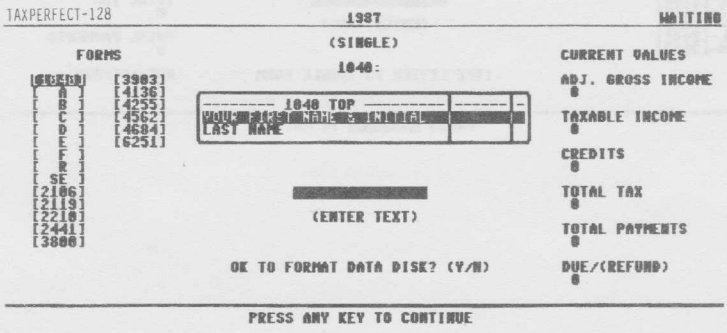

TAXPERFECT-128
1987
WAITING
FORMS
[3903]
[A]
[4136]
[B]
[4255]
[C]
[4562]
[D]
[4684]
[E]
[6251]
[F]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
PRINTER COMMANDS
(FT) A = ALIGN PAPER
(FT) P = PRINT ACTIVE FORMS
(FT) 1 = PRINT SINGLE FORM
(FT) R = PRINT REVIEW
(FT) I = PRINT INPUT SHEET
(FT) 2 = CHANGE PAPER TYPE
OTHER COMMANDS
(FT) (SHFT)-F = FILING STATUS
(FT) N = NEW TAXPAYER
(FT) K = CHANGE SCREEN COLOR
(FT) W = CHANGE 40/80 DISPLAY
(FT) M = CHANGE PLANNING/PREPARE
(FT) C = CALCULATION CONTROL
(FT) F = FORM SELECTION
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS TO EXIT
PRESS KEY FOR MORE INFORMATION

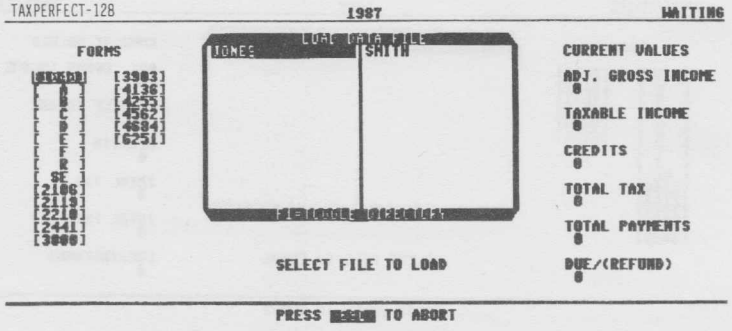
SCREEN NO. 16

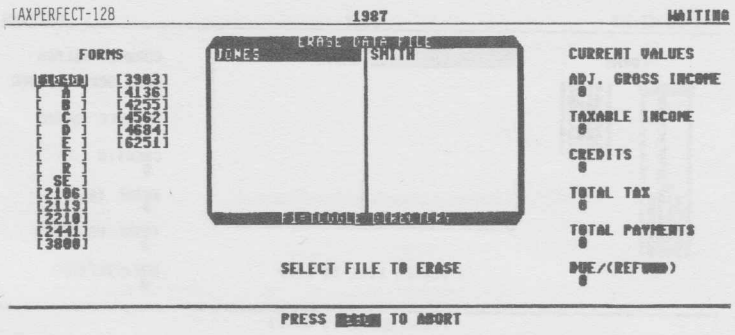
CHANGE TO 40 COLUMN MONITOR

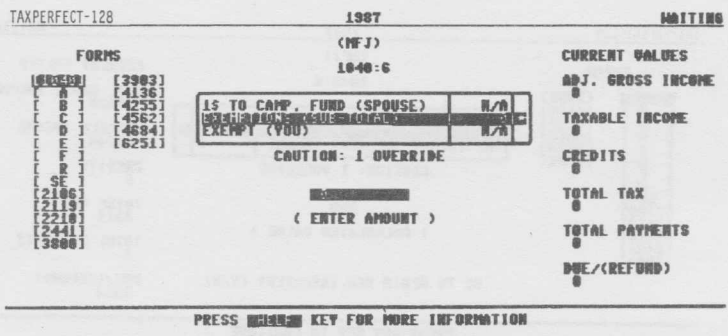

TAXPERFECT-128
1987
WAITING
FORMS
[SCHED]
[A]
[B]
[C]
[D]
[E]
[F]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
JONES
SMITH
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS ANY KEY TO CONTINUE


TAXPERFECT-128
1987
WORKING
FORMS
A-[A]
B-[B]
C-[C]
D-[D]
E-[E]
F-[F]
I-[2105]
J-[2119]
K-[2210]
L-[2441]
M-[3800]
N-[3903]
O-[4136]
P-[4255]
Q-[4562]
S-[6251]
(SINGLE)
1040:
1040 TOP
LAST NAME
(ENTER TEXT)
TYPE LETTER TO TOGGLE FORM
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS TO EXIT

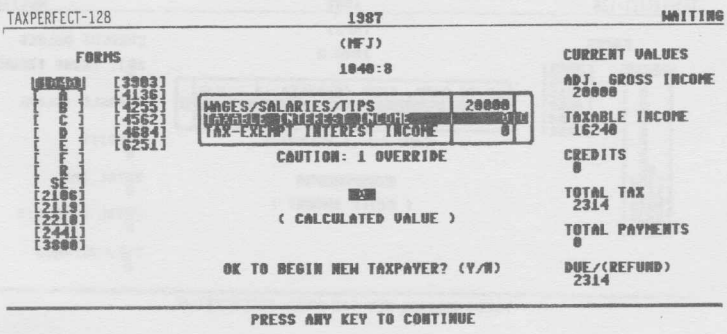

TAXPERFECT-128
1987
WAITING
(SINGLE)
FORMS
1040:
[ENTER]
[A]
[B]
[C]
[D]
[E]
[F]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
1040 TOP
YOUR FIRST NAME & INITIAL
LAST NAME
(ENTER TEXT)
OK TO FORMAT DATA DISK? (Y/N)
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS ANY KEY TO CONTINUE

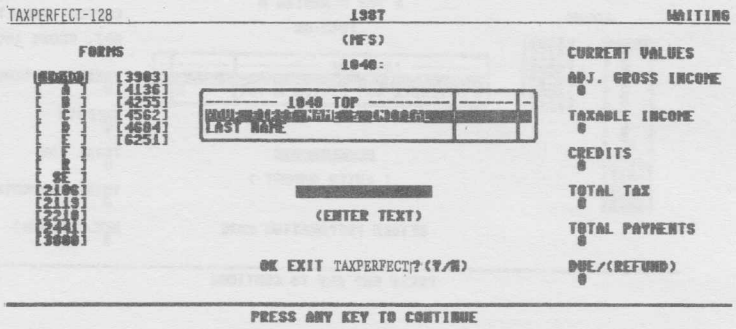

TAXPERFECT-128
1987
WAITING
FORMS
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
[A]
[B]
[C]
[D]
[E]
[F]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
LOAD DATA FILE
JONES
SMITH
F1=TOGGLE DIRECTORY
SELECT FILE TO LOAD
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS ESC TO ABORT

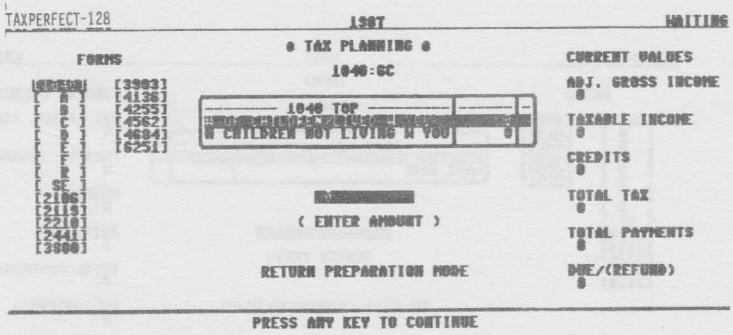

TAXPERFECT-128
1987
WAITING
FORMS
[1040]
[A]
[B]
[C]
[D]
[E]
[F]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
ERASE DATA FILE
JONES
SMITH
F1=TOGGLE SPACE=SELECT
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
SELECT FILE TO ERASE
PRESS ESCAPE TO ABORT


TAXPERFECT-128
1987
WAITING
(MFJ)
1040:6
FORMS
[2903]
[4136]
[4255]
[4562]
[4684]
[6251]
[2106]
[2119]
[2210]
[2441]
[3800]
$ TO CAMP. FUND (SPOUSE) N/A
EXEMPT (YOU) N/A
CAUTION: 1 OVERRIDE
(ENTER AMOUNT)
CURRENT VALUES
ADJ. GROSS INCOME
TAXABLE INCOME
CREDITS
TOTAL TAX
TOTAL PAYMENTS
DUE/(REFUND)
PRESS F1 KEY FOR MORE INFORMATION

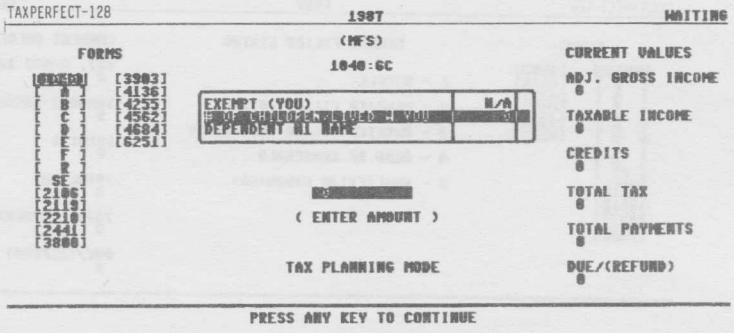
SCREEN NO. 23

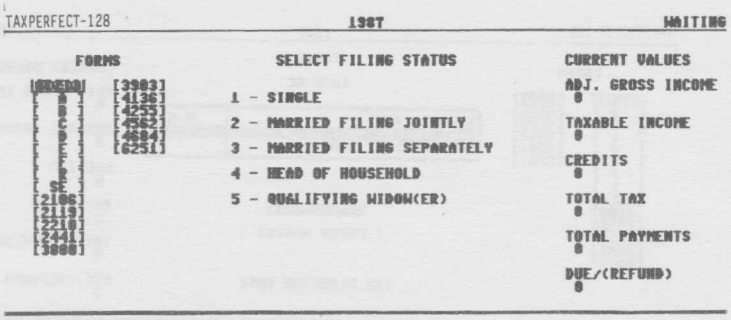

TAXPERFECT-128
1987
WAITING
(MFJ)
1040:8
FORMS
[1040]
[A]
[B]
[C]
[D]
[E]
[F]
[R]
[SE]
[2106]
[2119]
[2210]
[2441]
[3800]
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
WAGES/SALARIES/TIPS 20000
TAX-EXEMPT INTEREST INCOME 0
CAUTION: 1 OVERRIDE
(CALCULATED VALUE)
OK TO BEGIN NEW TAXPAYER? (Y/N)
CURRENT VALUES
ADJ. GROSS INCOME
20000
TAXABLE INCOME
16240
CREDITS
0
TOTAL TAX
2314
TOTAL PAYMENTS
0
DUE/(REFUND)
2314
PRESS ANY KEY TO CONTINUE

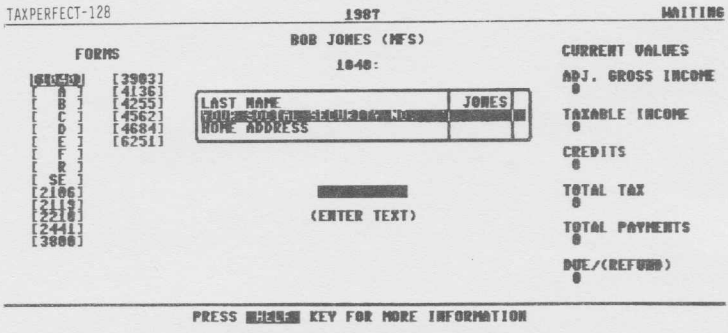

TAXPERFECT-128
1987
WAITING
(MFS)
1040:
FORMS
CURRENT VALUES
ADJ. GROSS INCOME
TAXABLE INCOME
CREDITS
TOTAL TAX
TOTAL PAYMENTS
DUE/(REFUND)
1040 TOP
LAST NAME
(ENTER TEXT)
OK EXIT TAXPERFECT?(Y/N)
PRESS ANY KEY TO CONTINUE


TAXPERFECT-128
1987
WAITING
FORMS
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
[2106]
[2119]
[2210]
[2441]
[3800]
0 TAX PLANNING 0
1040:EC
1040 TOP
CHILDREN NOT LIVING W YOU
(ENTER AMOUNT)
RETURN PREPARATION MODE
CURRENT VALUES
ADJ. GROSS INCOME
TAXABLE INCOME
CREDITS
TOTAL TAX
TOTAL PAYMENTS
DUE/(REFUND)
PRESS ANY KEY TO CONTINUE

SCREEN NO. 26


TAXPERFECT-128
1987
WAITING
(MFS)
1040:GC
FORMS
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
[2106]
[2119]
[2210]
[2441]
[3800]
EXEMPT (YOU)
N/A
DEPENDENT NI NAME
(ENTER AMOUNT)
TAX PLANNING MODE
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0
PRESS ANY KEY TO CONTINUE


TAXPERFECT-128
1987
WAITING
FORMS
[3903]
[4136]
[4255]
[4562]
[4684]
[6251]
SELECT FILING STATUS
1 - SINGLE
2 - MARRIED FILING JOINTLY
3 - MARRIED FILING SEPARATELY
4 - HEAD OF HOUSEHOLD
5 - QUALIFYING WIDOW(ER)
CURRENT VALUES
ADJ. GROSS INCOME
0
TAXABLE INCOME
0
CREDITS
0
TOTAL TAX
0
TOTAL PAYMENTS
0
DUE/(REFUND)
0


TAXPERFECT-128
1987
WAITING
FORMS
BOB JONES (MFS)
1040:
CURRENT VALUES
ADJ. GROSS INCOME
TAXABLE INCOME
CREDITS
TOTAL TAX
TOTAL PAYMENTS
DUE/(REFUND)
LAST NAME
JONES
HOME ADDRESS
(ENTER TEXT)
PRESS HELP KEY FOR MORE INFORMATION

APPENDIX I

TAXPERFECT INPUT-PROMPT ABBREVIATIONS

W/ ..... With

W/O ..... Without

AGI ..... Adjusted Gross Income

SS# ..... Social Security Number

APPENDIX J

TAXPERFECT QUICK REFERENCE GUIDE

THE CURSOR KEYS

Hold Down [SHIFT] And Press:	When You Want To
[CLR/HOME]	Clear All Input From Field.

Press:	When You Want To
[RETURN]	Advance From Current Field To Next Field Without Making Any Entry.
[DELETE]	Clear Field Toward Left Of Cursor/One Space At A Time.
[HOME]	Go To The Top Of The Current Form.
[ARROW UP] (↑)	Scroll Upwards To Previous Field.
[ARROW DOWN] (↓)	Scroll Downwards To Next Field.
[LEFT ARROW] (←)	Scroll Left To Previous Space.
[RIGHT ARROW] (→)	Scroll Right To Next Space.

THE FUNCTION KEYS

Press:	When You Want To
[PF1]	Calculate/Update Entire Return.
[PF2]	Override Calculated-Value Fields.
[PF3]	Go To Beginning of Next Section.
[PF4]	Go To Beginning of Prior Section.
[PF5]	Go To Different Form.
[PF6]	Return To Calling Form.
[PF7]	Activate Command Mode.
[PF8]	Invoke Datachek™ Function.

THE COMMAND MODE KEYS

Press And Release PF7 Hold Down [SHIFT] And Press:	When You Want To
[A]	Change and Set Data Disk Drive Address.
[Q]	Create A Data Disk.
[L]	Load File From Program Disk.
[S]	Save File To Program Disk.
[F]	Change Taxpayer Filing Status.
[P]	Save Preparer Data.

Press And Release PF7 Then Press:	When You Want To
[D]	Display The Disk Directory.
[L]	Load File From Data Disk.
[S]	Save File To Data Disk.
[P]	Print Entire Return.
[1]	Print Single Form Or Schedule.
[2]	Select Single Or Continuous Printout.
[R]	Print Review.
[I]	Print Input Sheets.
[F]	Forms Selection/Activate Chosen Forms.
[N]	New Taxpayer/Clear Memory.
[E]	Erase Data File.
[K]	Select New Screen/Border Colors.
[M]	Change Mode - Return Prep To Tax Planning.
[A]	Align Form For Continuous-Form Output.
[V]	Validate Disk.
[X]	Exit **TAXPERFECT**.
[W]	Change Screen Width 40/80 Column.
[C]	Disable/Enable Calculated-Value Fields.

APPENDIX K

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4

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